



KENT BUSINESS COLLEGE

COLLEGE OF PROJECT CONTROLS & MANAGEMENT

# Employer Commitment Charter

## Associate Project Manager Level 4

PMP preparation · AI in Project Controls



A PRACTICAL REFERENCE FOR EMPLOYERS & LINE MANAGERS

EMPLOYER & LINE MANAGER GUIDE | SEPTEMBER 2026

# Employer Commitment Charter

## Associate Project Manager Level 4

Employer Commitment Charter | PMP preparation and AI in Project Controls and Management

A complete reference for the employer, line manager and workplace mentor. Use it to agree practical support, organise meaningful workplace learning and make well-evidenced decisions throughout the apprenticeship. The guide supports discussion and preparation alongside your apprenticeship agreement, individual training plan and confirmed programme offer, which record the arrangements for the learner. Professional qualifications and examinations retain their own entry and award requirements. All workplace examples created for this edition are illustrative unless expressly identified as a source account.

## About this edition

Kent Business College's employer and line-manager guide to the Associate Project Manager Level 4 apprenticeship. The eight chapters cover employer partnership, curriculum, workplace learning, assessment, quality, safeguarding and practical support, aligned with ST0310 version 1.5. Worked examples are hypothetical and support professional discussion.

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## Use this book in the workplace

Before enrolment, focus on the partnership, role and learning plan. During delivery, return to the curriculum, workplace evidence and review guidance. As assessment approaches, use the readiness checks and programme-specific requirements. The final chapters explain how to resolve questions and find support.



## CHAPTER 01

# A partnership with purpose

Developing the judgement, confidence and discipline behind successful projects

## Welcome to your employer charter

Thank you for supporting an Associate Project Manager Level 4 apprentice with Kent Business College. A well-supported apprenticeship develops a person who can connect the purpose of a project to the work needed to deliver it. They learn to clarify requirements, organise activities, coordinate people, interpret information and raise decisions at the right time. Those capabilities matter in a small improvement initiative as much as in a major programme. Your organisation supplies the real context in which they become reliable professional habits. This charter is a practical guide for the employer, line manager and workplace mentor. It explains the partnership you are joining, the learning journey, the work opportunities your apprentice needs and the support you can expect. It also gives you examples of useful evidence, questions for progress reviews and ways to assess business impact without overstating results. Read the first two chapters before the initial commitment meeting. Return to the curriculum and support chapters when allocating work, and use the final chapters whenever a question or concern arises.

KBC's published route combines eight months of Project Management Professional preparation with four months of AI in Project Controls and Management. This is a 12-month learning route, followed by the separate apprenticeship assessment period. The individual training plan confirms the actual dates, learning hours, support arrangements and assessment version for each apprentice. It reflects their starting point, the opportunities in their role and the time needed to become occupationally competent. A timetable provides structure; it is not a promise that every person will be ready at the same speed. Your apprentice remains an employee with productive responsibilities. They also need protected time to acquire capabilities they do not already possess. The most successful arrangement deliberately connects those two realities. A scheduling lesson might lead to a more credible plan for an office move; a stakeholder discussion might help a digital rollout secure better adoption; a lesson on data validation might prevent a misleading status

report from reaching a sponsor. Learning becomes valuable when the apprentice can explain both the method and the decision it improved.

### How to use the examples

All businesses, people, projects, figures and outcomes in the worked examples in this guide are hypothetical. They illustrate management practice and evidence quality. They are not KBC learner results, promised savings or guaranteed assessment outcomes. Adapt the approach to your own organisation and retain evidence of what actually happens.

## The occupation: more than project administration

The Associate Project Manager occupation supports delivery across a project lifecycle. The apprentice may own a small project, a workstream or defined activities within a larger project, usually reporting to a project manager. They need sufficient responsibility to make recommendations, coordinate delivery and monitor outcomes within agreed limits. Seniority in a job title is less important than access to meaningful work. A project administrator can have an excellent development opportunity if the role expands into analysis and coordination; an employee called a project manager can have an unsuitable role if they cannot access budgets, stakeholders or change decisions.

The occupational standard covers work in businesses, public services and charities, including office, site, client and remote environments. It connects business cases and governance with stakeholder engagement, scope, scheduling, resources, risk, quality, budget monitoring, reporting and lessons learned. Inclusion, ethical conduct, sustainability and appropriate use of technology run through this work. These are not separate topics to visit once at induction. They affect the way requirements are understood, suppliers are considered, information is shared and decisions are challenged. There is a useful distinction between producing a document and exercising a professional skill. Copying dates into a schedule is an activity. Checking dependencies, identifying an unrealistic resource assumption and proposing an achievable sequence demonstrates scheduling judgement. Taking minutes records a meeting. Recognising an unresolved decision, confirming its owner and following it through demonstrates coordination. A manager can improve the apprenticeship immediately by asking the apprentice to explain what a document means and what action it should prompt.

- Agree the boundary of authority: which decisions the apprentice can take, which require advice and which must be escalated. Put this in the project brief and revisit it as competence grows.
- Give access to the reasons behind decisions. Observing a governance meeting is more useful when the apprentice can see the business case, understand the options and discuss the outcome afterwards.
- Offer a sequence of increasingly demanding responsibilities. Begin with a supported analysis, progress to a recommendation and then delegate a bounded area of delivery with agreed checkpoints.

### A role that develops

An apprentice supporting a service improvement project initially records actions. Their manager then asks them to analyse overdue actions by cause, interview owners and propose a revised review process. Later they coordinate a pilot, track implementation and report what changed. The administrative starting point becomes a route into analysis, stakeholder management and controlled delivery.

## The four outcomes worth pursuing

A strong apprenticeship should produce four connected outcomes. First, the apprentice becomes more capable: their knowledge is deeper, their practical decisions are better and their professional behaviours are more consistent. Second, the employer gains useful project outcomes and a stronger internal capability. Third, the apprentice develops authentic evidence of occupational competence and is prepared for independent assessment. Fourth, both parties can identify a sensible next stage of professional development. Focusing on only one outcome weakens the others.

| Outcome              | What you should be able to see                                                                   | A useful management question                                                      |
|----------------------|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Capability           | A stronger explanation, more reliable judgement and appropriate independence in comparable work. | What can you now do that required help at the start?                              |
| Business value       | A credible change in delivery quality, information, decision speed, adoption or resource use.    | What improved, for whom, and what evidence supports that conclusion?              |
| Assessment readiness | Relevant, attributable work evidence and a clear account of the apprentice's contribution.       | Can you explain why you chose this approach and what you learned from its result? |
| Progression          | An agreed next responsibility, continued development or suitable professional route.             | What additional experience will prepare you for the next step?                    |

PMP preparation is part of the KBC learning offer; PMP certification is a separate award controlled by the Project Management Institute. PMI decides eligibility, requires an application and examination, and sets ongoing certification conditions. Completing this apprenticeship does not itself confer PMP status. Similarly, professional membership or further study can support progression but has its own requirements. Discuss aspirations early so that the apprentice can build relevant experience while remaining focused on the occupational standard. Avoid making early success depend on a promotion, a cash saving or a flawless project. A project can encounter difficult circumstances while the apprentice demonstrates sound judgement and meaningful learning. A forecast that exposes a genuine problem may initially look worse than the previous report while improving management control. Encourage accurate reporting and sensible action, even when the message is uncomfortable. Professional confidence grows when honesty is valued more highly than an attractive status colour.

## Values that make project teams trustworthy

Project work brings people with different roles, interests and experiences together. Your apprentice should learn to listen carefully, communicate respectfully and take responsibility for the effect of their work. British Values provide a practical foundation: democratic participation, the rule of law, individual liberty, mutual respect and tolerance of people with different faiths and beliefs. In a project environment, these values can be seen in how a team invites challenge, follows legitimate controls, makes room for different perspectives and treats individuals fairly.

Democratic participation does not remove the need for accountable decision-makers. It means stakeholders have appropriate opportunities to contribute, objections are considered and decisions are explained. The rule of law means that speed or commercial pressure does not justify ignoring safety, data protection or procurement responsibilities. Individual liberty means that people can raise concerns and make informed choices without intimidation. Mutual respect includes listening to a technical specialist, an end user or a junior colleague with equal seriousness when their evidence is relevant. An apprentice may encounter pressure to suppress a risk, accept an inaccessible solution or exaggerate delivery progress. Prepare them to respond professionally before such a situation occurs. Agree a route for seeking advice, protect the right to question a decision and model respectful disagreement. A useful challenge identifies the issue, explains its consequence and proposes a next step. It does not attack the character or motives of another person.

### A values conversation

In a hypothetical system rollout, a stakeholder says that accessibility testing can be skipped because only a few employees need it. The apprentice raises the effect on those employees, records the requirement and asks the project manager to confirm an appropriate testing decision. The manager supports the challenge, obtains specialist advice and documents the response. The learning lies in inclusive decision-making, evidence and escalation, rather than in making the apprentice a legal specialist.

- Ask: whose voice is missing from this decision, and how could we hear it appropriately?
- Ask: which policy, requirement or professional principle should guide the next step?
- Ask: have we explained the decision in a way affected people can understand?

## Before the first learning session

Use the enrolment period to make the partnership workable. Review the job role and prior learning with KBC, confirm the apprentice's development goals and identify workplace activities that can support the standard. Agree who will release time, who can provide subject expertise and who will attend reviews. Check that the apprentice can access the learning systems and join online sessions from a suitable environment. A quiet room, working headset and protected calendar are practical learning resources, not minor administrative details.

Read the apprenticeship agreement, training plan and any employer funding or service documents before signing. Check names, dates, working arrangements, responsibilities and costs. Raise questions while corrections are easy. The charter explains the approach but does not replace those individual documents. KBC's enrolment process asks the relevant parties to review and sign their documents before the commitment meeting is booked; if clarification is needed beforehand, use the available advice route so that agreement is informed. Set a baseline using evidence of actual experience rather than confidence alone. Ask the apprentice to discuss a recent piece of project work: what they did, what they understood and what support they needed. Existing qualifications and previous experience may reduce the learning required or show that a different programme is more appropriate. The purpose is to establish genuine new learning, not to reward a high self-rating by repeating skills already mastered.

- Name a line manager and a deputy so that learning time and reviews remain supported during absence.
- Select an initial project or workstream and a backup opportunity in case business priorities change.
- Record the agreed training pattern, evidence locations and communication channels.
- Confirm the apprentice knows how to access learning support, raise a safeguarding concern and request a confidential conversation.
- Schedule the first manager check-in and the first tripartite review before normal project pressures fill the diary.



## CHAPTER 02

# The employer partnership

Clear responsibilities and useful day-to-day support

## Three parties, one coherent development plan

The employer, apprentice and training provider each hold part of the apprenticeship. The employer provides employment, relevant work, supervision and the time and resources to learn. The apprentice engages with learning, applies it in practice and maintains an honest record of development. KBC designs and delivers the curriculum, coaches the apprentice, assesses progress during training and coordinates the support and formal processes. These responsibilities overlap through discussion; they should not disappear into assumptions about what another party is doing. Your workplace view is essential because completed assignments do not always demonstrate effective performance in a live project. KBC's teaching and assessment view is equally important because a productive employee can still have significant gaps in occupational knowledge. The apprentice adds their experience of what is helping, what is difficult and what opportunities they need. A strong review brings these perspectives together and turns them into a specific next step.

| Partner                  | Main contribution                                                                                | Evidence of a functioning partnership                                                                  |
|--------------------------|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Employer or line manager | Meaningful work, protected learning time, appropriate authority and informed workplace feedback. | Work allocation reflects learning priorities; review actions are completed; concerns are raised early. |
| Apprentice               | Active participation, practice, reflection, evidence and professional communication.             | The apprentice can explain new learning, demonstrate their contribution and request help in time.      |
| KBC                      | Sequenced teaching, coaching, progress assessment, support and programme coordination.           | Feedback identifies improvement; progress is reviewed against the standard; the plan responds to need. |

A simple operating agreement prevents avoidable friction. Confirm who can rearrange a learning session, how a missed session is reported, where evidence is stored and who signs a workplace statement. Agree the method for urgent contact and the route for routine questions. If a project sponsor and line manager are different people, include both in relevant planning conversations. The apprentice should not have to negotiate contradictory instructions alone.

### A partnership problem resolved

A hypothetical apprentice is praised for meeting project deadlines but repeatedly misses learning sessions. The line manager assumed recordings could replace attendance automatically; the tutor assumed the manager had protected the diary. A joint conversation agrees a fixed learning block, a deputy for urgent work and a planned catch-up route. Responsibility becomes visible, and the apprentice no longer has to choose silently between conflicting expectations.

## Your responsibilities as the employer

Provide a job with a genuine productive purpose and sufficient connection to the Associate Project Manager occupation. The apprenticeship must be capable of developing substantial new occupational knowledge and skills. Work with KBC to review suitability at the start and when the role changes. An existing employee can benefit if there is meaningful new learning; an employee who already performs the full occupation competently may need a different development route. The initial assessment should guide the decision, rather than the convenience of a funding opportunity. Protect the agreed training within paid working time. Allocate work on the basis that the apprentice has a development commitment, just as you would allocate capacity for a planned project activity. Provide equipment, access to relevant systems and reasonable opportunities to gather evidence. These arrangements matter particularly when an apprentice works remotely, moves between sites or supports several project managers. A calendar invitation alone does not protect time if competing managers continue to allocate urgent tasks into it.

Keep employment and training information accurate. Tell KBC promptly about changes in manager, role, working hours, location, extended absence or employment status. These changes can affect learning opportunities, dates, support and funding arrangements. Do not leave the apprentice to interpret the consequences unaided. KBC's compliance team should confirm the appropriate action using the rules applicable to the individual, including any change to the training plan or formal break in learning. Support the apprentice through the assessment stage. Select an approved assessment organisation with KBC's guidance, allow access to suitable project evidence and confirm occupational readiness responsibly. Assessment is independent; the employer's role is to provide a fair opportunity and an informed readiness decision. This includes time, resources and appropriate confidentiality arrangements, while respecting requirements for the apprentice to complete assessed work unaided.

- Ensure that the workplace is safe, respectful and suitable for learning, with clear reporting routes and proportionate supervision.
- Attend agreed progress reviews or arrange an informed deputy who can make decisions about work and resources.
- Give honest feedback about capability and performance, including concerns that may be difficult to raise.
- Support learning records and evidence checks without approving information you cannot verify.
- Clarify the agreed employer contribution, included services and any separately agreed costs before commitments are made.

## Your role as the line manager

The most useful line-manager support is often brief, specific and frequent. Ask what the apprentice has learned this week, where they can apply it and what is preventing progress. Select one piece of work for discussion instead of asking whether everything is fine. A five-minute conversation about the assumptions in a forecast can reveal more than a long general conversation about confidence. Regular contact also helps you notice changes in engagement or wellbeing before they become a major barrier. Use a progression of demonstration, supported practice and independent application. When introducing a risk review, you might first explain how you distinguish a cause, event and effect. Next, ask the apprentice to draft several risks and discuss the reasoning. Later, let them facilitate a bounded review and evaluate what changed. The purpose is not to remove every difficulty; it is to offer enough challenge for learning while keeping consequences proportionate to the apprentice's current competence.

Give feedback on observable work and its effect. "Your update was unclear" provides little direction. "The update lists the delay but does not identify the decision needed; add the owner, options and latest decision date" shows how to improve. Ask the apprentice to explain their reasoning before giving your answer. If their approach differs from yours, assess whether it is justified and effective rather than assuming only one method is acceptable. A workplace mentor can supplement your role where specialist expertise is needed. For example, a finance colleague might explain cost coding and forecast assumptions; a planner might demonstrate schedule logic; an information-security specialist might review an automation proposal. Mentoring should support the agreed

learning outcomes. It does not transfer your responsibility for suitable work, protected time and overall employment support.

### **A useful coaching exchange**

In a hypothetical project, an apprentice recommends adding two people to recover a delay. The manager asks which activities those people would perform, whether access and skills are available and whether the delayed work lies on the critical path. The apprentice discovers that a decision from a supplier, not capacity, is the immediate constraint. The manager has developed judgement without simply replacing the recommendation.

- What evidence led you to that recommendation?
- What alternatives did you consider, and why did you reject them?
- Which assumption would most change the answer?
- What can you decide, and what needs someone else's authority?
- What will you check after the action is taken?

## **What you should expect from your apprentice**

Expect the apprentice to engage actively and professionally with both work and learning. They should attend agreed sessions, complete preparatory activities, submit work on time and ask for help when a barrier emerges. They should maintain accurate learning records, preserve evidence of their contribution and respond to feedback. These expectations need to be explained clearly and supported by realistic workload planning. Professional accountability is compatible with recognising that an apprentice is still developing. The apprentice should be able to discuss new learning in their own words. A polished document is not enough if they cannot explain the decisions behind it. Encourage them to distinguish what they produced, what others contributed and what they learned. They should disclose assistance and use digital or AI tools in accordance with employer, KBC and assessment requirements. They must not fabricate work, retrospectively invent learning hours or submit another person's analysis as their own.

Ask the apprentice to prepare for reviews with evidence and questions. A useful preparation note identifies recent learning, one workplace application, feedback received, an unresolved difficulty and a proposed next step. It should also flag time lost to business pressure or unavailable work opportunities. Reporting a problem early is a professional behaviour; concealing it until a deadline is missed makes support harder. Expect increasing independence, but assess it fairly. An apprentice may be confident with familiar stakeholders and hesitant in a new technical environment. They may explain a concept well but need practice applying it under time pressure. Use examples across several situations before concluding that a skill is secure. A temporary setback should lead to a clear diagnosis and support plan, rather than a global judgement about motivation or ability.

- Agree how the apprentice communicates unavoidable absence or a likely missed deadline.

- Ask them to maintain a small list of current learning priorities and bring it to workplace discussions.
- Encourage appropriate challenge, curiosity and recognition of the limits of their knowledge.
- Recognise honest reporting, good preparation and thoughtful improvement as well as completed deliverables.

## What you should expect from KBC

You should receive a programme that connects the occupational standard, the apprentice's starting point and the opportunities in their job. KBC should explain the learning sequence, delivery arrangements, assessment expectations and the responsibilities of each party. Teaching should develop understanding and application, while feedback should show the apprentice how to improve. Your coach should be able to explain progress in terms of knowledge, practical skill and professional behaviour, rather than relying only on attendance or submitted work. KBC's published learning pattern includes weekly live teaching, guided materials, monthly assignment work, monthly coaching and tripartite progress reviews around every ten weeks. The individual plan confirms the pattern for the apprentice. Where flexibility or catch-up is agreed, there should still be evidence of engagement and learning. Access to a recording does not prove that learning occurred; a completed quiz alone may not show that a concept can be applied at work.

Expect communication that is clear enough to support management decisions. A progress update should distinguish a missed submission, weak evidence, an unavailable workplace opportunity and a wellbeing concern because these require different responses. KBC should agree actions with you and the apprentice, identify owners and follow up. You should know how to obtain support for technical access, learning needs, compliance, safeguarding and quality concerns. Employer feedback should influence improvement. If a curriculum topic is difficult to apply in your sector, explain the practical problem and provide an example. KBC can consider a different learning activity or contextual example while keeping the occupational standard intact. If communication or review arrangements are not working, seek a specific change. Constructive challenge strengthens the partnership when it focuses on the apprentice's experience and the evidence.

### What a helpful update looks like

"The apprentice can explain change control and has drafted a suitable request, but has not yet followed a change through approval and implementation. Before the next review, the employer will provide access to one live change meeting and a bounded change to coordinate. The coach will review the decision trail and question the apprentice about its effect on scope, cost and schedule." This is more useful than "change control: amber".

## Accountability without unnecessary bureaucracy

Keep records that support an actual decision. A clear training plan, useful review note, accurate learning record and well-chosen evidence can demonstrate a strong apprenticeship without creating excessive paperwork. The test is whether another responsible person can understand what was agreed, what happened and what needs to happen next. Records that repeat generic assurances while leaving actions unclear create work without improving support. Use proportionate confirmation. If you observed the apprentice leading a stakeholder meeting, record the date, context, behaviour and result. If you did not observe it, explain the basis of your knowledge or ask the appropriate colleague for evidence. Do not sign a blanket statement that every competence has been demonstrated because the apprentice needs a deadline met. Where there is uncertainty, identify it and agree how it will be resolved.

Separate developmental discussion from employment performance procedures while keeping the two coordinated. A learning difficulty may require teaching, practice or an adjustment. A conduct issue may require an employer process. A safeguarding concern needs the safeguarding route. They can coexist, but treating all problems as poor attitude can prevent the right support. Discuss the cause before selecting an intervention, and involve the appropriate specialists. When you change a manager, make a short handover covering the programme, protected time, current strengths, upcoming work opportunities and open actions. Introduce the new manager to the coach. Explain which evidence is available and where the apprentice is building independence. A managed handover prevents the apprentice from having to rebuild the partnership while also adapting to a new supervisor.

- Record decisions and actions with an owner and date, rather than long meeting transcripts alone.
- Keep confidential employment or welfare information in the appropriate restricted location.
- Use the apprentice's actual progress to decide support, rather than comparing them mechanically with another learner.
- Check that agreed actions have changed the learning experience; closing a task is not the same as resolving a barrier.



## CHAPTER 03

# From learning to delivery

Curriculum, workplace capability, business impact and independent assessment

## The programme purpose and its three stages

KBC's Associate Project Manager route is intended to develop a practitioner who can bring order, evidence and sound judgement to project delivery. The curriculum connects broad project management preparation with applied digital capability. The apprentice learns to understand the business purpose, organise and control work, coordinate stakeholders and evaluate outcomes. In the final learning stage, they explore how dashboards, structured information and governed automation can improve the same project decisions. The published KBC route has three four-month teaching stages: PMP preparation part one, PMP preparation part two, and AI in Project Controls and Management. The first eight months establish and apply the core project management disciplines; the final four months extend their practical use through digital tools. Individual sequencing may be adjusted to the learner's starting point and workplace opportunities. The occupational standard remains the reference for competence even where a professional preparation syllabus uses different headings. The official ST0310 version 1.5 standard describes a typical 18-month on-programme duration and a typical five-month assessment period. Its assessment plan requires at least 12 months on-programme. KBC's 12-month learning offer therefore needs to be considered through the individual assessment and training plan; it is not the national typical duration and should not be treated as an automatic acceleration for everyone. The planned learning, competence and applicable requirements must all be achievable.

| Stage                                             | Learning emphasis                                                                                             | Useful workplace opportunity                                                                        |
|---------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Months 1–4:<br>establish the project              | Purpose, governance, lifecycle, stakeholders, scope, planning and the relationships between project controls. | A project brief, a stakeholder discussion, a scoped work package and an initial delivery plan.      |
| Months 5–8:<br>coordinate and control             | Resources, budgets, risk, quality, procurement, change, communication, performance and lessons.               | A live workstream with meaningful reporting, decisions, changes and stakeholder coordination.       |
| Months 9–12:<br>improve information and decisions | Data quality, dashboards, AI-assisted analysis, workflow automation and human approval.                       | A bounded improvement to project reporting or a controlled digital prototype with verified results. |
| Gateway and separate EPA                          | Employer readiness decision, approved project scope, portfolio and independent assessment.                    | Access to authentic project records, preparation time and a suitable assessment environment.        |

### Plan for the whole journey

Do not allocate the apprentice to a 12-month project and assume the employer commitment ends with the final teaching session. Gateway, the written report, independent assessment and any further learning may require continued employment support, access to records and protected time. Confirm these arrangements before the project team disperses.

## A manager-friendly map of the occupational standard

Knowledge, skills and behaviours describe different aspects of competence. Knowledge is what the apprentice needs to understand; skills are what they need to do; behaviours are how they act in professional situations. A useful work activity often develops several of these together. For example, coordinating a change may involve understanding configuration management, applying the change process, communicating with stakeholders and acting with integrity when reporting consequences. The following map groups verified ST0310 version 1.5 requirements into practical areas for work allocation. It is an employer planning aid, not a substitute for the full standard or the assessment organisation's method-specific mapping. The coach should maintain the detailed mapping and identify gaps. Do not assume that one document proves every code listed in an area; the apprentice's actual contribution and explanation determine what the evidence demonstrates. Use this map to ask whether the role offers breadth as well as depth. An apprentice who produces excellent dashboards may still need access to business cases, resource planning or stakeholder negotiation. An apprentice who coordinates many meetings may need stronger cost analysis and evidence of quality management. Identify such gaps early enough to arrange meaningful work. A short, well-designed rotation or contribution to another project can be more useful than trying to force every requirement into one unsuitable task.

| Capability area                       | Examples of verified KSB references | Work that can develop the capability                                                                              |
|---------------------------------------|-------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Purpose and governance                | K1-K11; S6, S9, S11, S20            | Review a business case, explain the delivery structure and prepare evidence for an approval decision.             |
| Stakeholders and communication        | K13-K17, K31; S2-S5, S7, S18        | Map stakeholder needs, adapt communications, coordinate delivery and resolve a bounded disagreement.              |
| Scope and change                      | K12, K19; S10, S25                  | Clarify acceptance criteria, maintain a controlled baseline and follow an approved change through implementation. |
| Schedule and resources                | K21, K22; S12, S17, S22, S26        | Create linked activities, identify constraints, assess resource availability and maintain an integrated plan.     |
| Cost and performance                  | K18, K20; S1, S8, S21               | Explain estimates, monitor budgets, interpret performance information and recommend proportionate action.         |
| Risk, quality and improvement         | K23-K26; S13-S16, S24               | Evaluate risks, coordinate responses, support quality checks and apply lessons to a later activity.               |
| Ethics, sustainability and technology | K27-K30; S19, S23                   | Apply relevant controls, consider sustainability and use digital tools appropriately.                             |
| Professional behaviours               | B1-B5                               | Adapt, collaborate, own work, protect integrity and confidentiality, and pursue continuing development.           |

## Project purpose, business cases and benefits

A project begins with a reason for change. The apprentice should understand the problem or opportunity, the people affected and the outcomes the organisation wants. They should distinguish the deliverable from the benefit: installing a new system is a deliverable; reducing the time required to resolve a service request is a potential benefit. A business case connects the proposed work with expected value, costs, risks and alternatives. Its assumptions need review as circumstances change. Give the apprentice a real business case or a proportionate project justification to review. Ask them to identify the strategic objective, the options considered, the main assumptions and the person responsible for realising benefits. They do not need authority to approve investment in order to contribute useful analysis. Their role might be to test a volume assumption, gather stakeholder evidence or identify an inconsistency between the expected benefit and the proposed scope. Useful evidence includes an annotated business case review, an options comparison, a benefits definition or a documented recommendation. Preserve the original context and the apprentice's contribution. A comment such as "benefits look reasonable" is weak because it does not show analysis. A stronger contribution explains that the forecast assumes all users adopt the system immediately, identifies evidence suggesting a phased rollout and recommends a revised measurement date.

### Worked example: a service request portal

A hypothetical employer wants to replace emailed requests with a portal. The apprentice discovers that the proposed benefit combines faster processing with reduced demand, although no activity addresses demand. They separate the two claims, define processing time from receipt to resolution and propose measuring adoption and rework alongside speed. The sponsor approves a pilot before a full rollout. The apprentice has improved the basis for a decision without claiming that the portal will certainly deliver the forecast.

- What problem are we solving, and whose evidence establishes it?
- Which alternative would we choose if the preferred option were unavailable?
- Who owns the benefit after the project closes?
- Which assumption needs to be checked before further commitment?
- What evidence would justify changing or stopping the project?

## Scope, requirements and a usable plan

A clear scope establishes what the project will deliver and the limits within which it will work. Requirements describe needs; acceptance criteria describe how fulfilment will be judged. The apprentice should learn to distinguish a stakeholder preference, a mandatory requirement and an assumption requiring confirmation. They should also recognise interfaces with other teams, suppliers or projects. Ambiguity left unresolved at the beginning often returns as disagreement during delivery. Ask the apprentice to help define a bounded work package. They might interview users, organise requirements, identify exclusions and agree acceptance criteria with the appropriate owner. A practical scope statement names the output, intended user, limits, dependencies and acceptance route. It should be understandable to the people who will use it. Avoid rewarding elaborate templates that conceal unresolved decisions. The project management plan should connect the important controls: scope, schedule, resources, costs, risk, quality, communication and change. These elements affect one another. A change in scope may alter testing, staffing and deadlines. A plan becomes useful when it allows the team to see those relationships and make proportionate decisions. The apprentice can contribute by reviewing whether separate documents tell a coherent story.

### Worked example: an office relocation

A hypothetical relocation plan says that staff will move on Friday, while the technology team's plan assumes network testing on the following Monday. The apprentice identifies the inconsistency, checks the dependency with both teams and proposes an earlier test with a clear acceptance owner. The evidence is the original issue, the apprentice's analysis, the agreed correction and the updated plan. A tidy final schedule alone would hide the judgement that produced the improvement.

- Can a user explain what will be different when this work is complete?
- Are exclusions visible, so that an unplanned request can be recognised?
- Who accepts the output, and what evidence will they use?
- Which part of the plan depends on an unconfirmed decision or another team's work?
- Do schedule, resource and cost assumptions still agree?

## Schedules, dependencies and resource realism

A schedule is a model of how work can be completed, not simply a list of desired dates. The apprentice should learn to break work into manageable activities, identify dependencies, estimate durations and consider resource availability. They should understand critical path analysis and the limits of the information used. The objective is to support decisions about sequence, priorities and exposure to delay, rather than to create visual certainty where uncertainty remains. Start with a small section of a live schedule. Ask the apprentice to explain why each activity follows another, who will perform it and what evidence supports its duration. Check whether a milestone depends on an approval, specialist resource, delivery or access window. Encourage them to test the effect of a changed assumption. If two tasks require the same person at the same time, the plan may be logically linked but operationally impossible. Resource planning should cover the right capability as well as the number of people. A project may have enough nominal capacity but lack access to a specialist at the required point. The apprentice can support a resource forecast, identify a clash and help negotiate a workable allocation. They should understand that a resource request needs authority and that planned availability must be confirmed with the responsible manager.

### Worked example: a three-week delay

A hypothetical project has five sequential activities: specification, supplier review, configuration, testing and approval. Configuration finishes early, but the specialist needed for testing is unavailable for three weeks. The apprentice demonstrates that extra configuration effort will not recover the final date. They propose bringing forward test preparation and negotiating a confirmed specialist window. The recommendation is based on dependencies and constraints, rather than an assumption that working faster anywhere will accelerate the whole project.

- What makes this sequence credible?
- Which activity currently controls the completion date?
- Are the people, equipment and access actually available when assumed?
- What is the effect of a late decision or an uncertain delivery?
- If we compress the schedule, which cost, quality or risk consequences need approval?

## Costs, forecasts and responsible performance reporting

Budget monitoring requires an understanding of what is being compared. A budget, an actual cost, a commitment and a forecast are different measures. The apprentice should learn the organisation's conventions and check the reporting date, scope and source before drawing conclusions. A favourable variance may reflect delayed work, an unprocessed invoice or an omitted commitment rather than a saving. Good reporting makes these limitations visible. Provide access to a suitable budget or a permitted extract. Ask the apprentice to reconcile a sample of figures, identify the basis of an estimate and explain a variance. They can then recommend what the project manager should investigate or decide. Where financial information is confidential, arrange a redacted extract or an authorised view that preserves the learning purpose. Do not assume that a completely invented budget can replace the need to demonstrate workplace application.

The standard includes knowledge of earned value management and interpretation of its information. Introduce it through a simple, explicit example before asking the apprentice to interpret a complex dashboard. Planned value represents the budgeted value of scheduled work; earned value represents the budgeted value of work actually achieved; actual cost represents expenditure for that work. These measures need consistent scope and a credible progress method. Arithmetic cannot compensate for unreliable inputs. Reporting should lead to an appropriate decision. A useful update distinguishes facts, assumptions, forecasts and recommendations. It identifies the issue, consequence, owner and required decision date. Encourage the apprentice to explain uncertainty in plain language. A sponsor needs to understand the implication for delivery; a finance colleague may need the detailed reconciliation. Adapting the message does not mean changing the underlying facts.

### Worked example: cost and progress

A hypothetical work package has planned value of £40,000, earned value of £32,000 and actual cost of £36,000 at the reporting date. Cost variance is £32,000 minus £36,000, or -£4,000. Schedule variance is £32,000 minus £40,000, or -£8,000 in budgeted value; it is not an eight-day delay. The cost performance index is about 0.89 and the schedule performance index is 0.80. The apprentice explains the adverse position, checks how progress was measured and asks whether delayed work, rework or estimation error is responsible before recommending action.

## Risk, issues, change and quality

Risk management concerns uncertainty that may affect objectives; issue management concerns matters that have already occurred or require resolution. The apprentice should learn to describe a risk clearly enough to support a response, rather than listing a vague topic such as “supplier”. A useful description connects cause, possible event and consequence. It also identifies an owner, a response and a point at which action will be reviewed. A risk register becomes useful when it changes behaviour. Give the apprentice responsibility for a bounded risk review, following up response actions or analysing whether information has changed. Ask them to distinguish reducing probability from reducing impact, and to consider opportunities as well as threats. An issue needs a clear owner and decision route. Repeatedly carrying the same item forward without action is not effective control.

Change control protects the coherence of the project. A request should explain what is changing, why it is needed and the effect on scope, time, cost, risk, quality and benefits. The apprentice can prepare analysis and coordinate the process, but approval must remain with the authorised person or body. Once approved, the relevant records and baselines need updating so that the team works from the same decision. Quality planning begins with clear requirements and acceptance arrangements. The apprentice should understand the difference between checking an output, assuring that a process is suitable and learning from a defect. Ask them to support a test or review plan, record findings and follow up corrective action. A defect log is evidence of useful work only when the apprentice can explain the criteria, their contribution and what happened as a result.

### Worked example: a supplier substitution

A hypothetical supplier proposes a cheaper component. The apprentice gathers the technical, cost and delivery implications, notices that the replacement changes the maintenance requirement and records a formal change request. A specialist checks suitability; the authorised decision-maker approves a revised option. The apprentice then confirms that the bill of materials, schedule and acceptance criteria are updated. The learning connects procurement, quality, risk, change and information control.

## Procurement and the supplier interface

Projects frequently depend on goods or services provided by others. The apprentice should understand how the employer selects suppliers, defines requirements, monitors commitments and handles changes. Their contribution must remain within the organisation's procurement authority and ethical controls. They may gather requirements, support an options comparison, maintain a delivery tracker or coordinate technical clarification without being authorised to enter a contract. Give the apprentice visibility of the criteria behind a purchasing decision. Price matters, but so do suitability, quality, delivery risk, support, operating cost and relevant sustainability considerations. Ask them to distinguish a supplier's claim from verified evidence and identify assumptions that need clarification. Where procurement is governed by specific rules, the responsible commercial or legal specialist should explain the applicable process. A useful supplier interface record identifies the required output, acceptance criteria, responsible contacts, agreed dates, dependencies and unresolved decisions. The apprentice can monitor whether these remain consistent with the project plan. A delivery date in an email is not necessarily a confirmed contractual commitment, and an informal conversation should not be treated as approval to change scope or cost.

### Worked example: the cheapest offer

A hypothetical employer compares two training-room equipment suppliers. One offer is cheaper but excludes installation and provides a delivery date that does not allow time for testing. The apprentice records the exclusions, obtains clarification through the authorised buyer and compares the options on a consistent basis. The manager makes the decision. The apprentice's evidence shows how their analysis improved the comparison, rather than claiming that they selected the supplier independently.

- What is included and excluded in each option?
- Which acceptance criteria and delivery assumptions are confirmed?
- What needs approval before a commitment is made?
- How will the project know that the supplier has met the requirement?
- What should be recorded if the supplier proposes a change?

## Stakeholder relationships and practical leadership

An associate project manager often achieves results through influence rather than formal authority. The apprentice needs to understand who is affected, who can make decisions and what information different people require. A stakeholder map should lead to a communication and engagement approach. It is not an end in itself. The manager can help by giving access to relevant people and explaining the organisational context without encouraging assumptions about their motives. Ask the apprentice to prepare and conduct a structured conversation with a stakeholder. They should clarify the purpose, listen for needs and concerns, check understanding and agree the next step. Afterwards, discuss what was learned and how it affects the plan. As confidence develops, they can coordinate a workstream meeting, negotiate a resource requirement or present a recommendation. The level of responsibility should increase with demonstrated competence. Conflict is not always a sign of a failing team. Different objectives, uncertain requirements or limited resources can create legitimate disagreement. The apprentice should learn to separate positions from interests, use evidence and remain within their authority. If resolution requires a policy decision or a trade-off beyond their role, appropriate escalation is a successful professional action. They should not promise a deadline, cost or resource allocation they cannot authorise.

### Worked example: competing priorities

In a hypothetical rollout, operations wants training after launch to avoid immediate disruption, while the project team wants users ready beforehand. The apprentice asks both groups about their constraints, identifies a short pilot session and proposes staggered training around operational peaks. The authorised managers agree the approach. Evidence includes the options, the apprentice's communication and the agreed action, rather than a claim that they single-handedly solved the conflict.

- What does this stakeholder need to know, decide or do?
- What have we heard directly, and what are we assuming?
- How will we check that the message was understood?
- Which commitments are within our authority?
- What can we learn from disagreement before escalating it?

## AI and digital tools: improving decisions with control

The final four-month KBC stage applies digital tools to project controls and management. Suitable activities include improving structured data, producing a dashboard, analysing meeting information, prototyping a workflow and exploring AI-assisted reporting. The learning purpose is better project information and more effective decisions. A visually impressive dashboard or fluent AI-generated narrative has little value if its data are wrong, its calculations are unclear or it conceals uncertainty. Choose a bounded problem with an owner and a baseline. For example, the apprentice might reduce repetitive preparation of a weekly status pack while preserving review and approval. Map the existing process, identify the source data and define the checks needed. Build and test in an appropriate environment before any live use. Access to production systems, personal information or confidential documents requires employer approval and the relevant controls. AI outputs need verification. An apprentice should check factual claims against source records, confirm calculations independently and review omissions or bias. They should know when a tool is unsuitable, when a human decision is required and how to disclose its use. Generated text must not be presented as an authentic meeting record, employer testimony or the apprentice's unaided assessment work. The assessment organisation's rules take precedence for assessed submissions.

### Worked example: an assisted status report

A hypothetical apprentice prototypes a report from an approved test dataset. The first output incorrectly treats blank completion dates as finished tasks and invents reasons for two delays. The apprentice documents the failures, changes the data rules, removes unsupported narrative and adds a source-linked review step. The useful evidence is the problem definition, tests, corrections and human approval process. Reporting that the tool "saved 80% of time" before checking output quality would miss the professional learning.

- Use authorised data and the minimum access needed for the task.
- Keep the source, transformation rules, calculations and version history understandable.
- Test unusual and incomplete inputs, not only examples that work.
- Define who reviews the result, who approves an action and how an error is corrected.
- Measure quality and reliability alongside time saved.
- Keep a manual fallback and a named owner if the prototype is adopted.

## Evidence that shows development and contribution

Collect evidence while work is happening. A useful record includes context, the apprentice's responsibility, the action taken and the resulting output or decision. It may be a schedule revision, a budget analysis, a change record, a meeting contribution, a quality check or a stakeholder communication. The evidence should make the apprentice's contribution distinguishable from the team's work. It should also remain understandable to someone who was not present. A strong evidence set often combines an artefact with contextual confirmation. An annotated forecast shows the analysis; a decision record shows how it was used; a direct-observation statement confirms what the apprentice did. Select meaningful examples rather than uploading every document. Preserve dates and versions where they matter. Remove unnecessary personal or commercially sensitive information through an agreed process without making the evidence misleading.

Teaching assignments and reflective accounts support learning. The apprentice may explain what they learned, why an approach worked and what they would do differently. These developmental activities must be distinguished from the version 1.5 EPA portfolio, which must not include reflective accounts or methods of self-assessment. KBC should help the apprentice select the appropriate evidence for the relevant purpose. Reusing a file is not automatically appropriate simply because it was accepted during teaching. Ask the apprentice to explain one evidence item aloud. If they cannot describe the problem, their decision and the result, the evidence may be weak or their understanding may need development. Use the conversation to improve learning during the programme. During independent assessment, respect the requirement for the apprentice to demonstrate their own competence without prompting or assistance.

| Weak evidence                              | Why it is weak                                            | A stronger alternative                                                                            |
|--------------------------------------------|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| A screenshot of a completed dashboard      | It does not show the source, checks or apprentice's role. | A defined reporting problem, verified data rules, test results and the approved dashboard output. |
| A manager says the apprentice is excellent | It provides opinion rather than observed performance.     | A dated account of a specific activity, what the apprentice did and the effect observed.          |
| An entire project folder                   | It creates volume without clear relevance or attribution. | Selected documents with a concise index and a clear explanation of contribution.                  |
| A copied template with generic text        | It does not show application to a real decision.          | A completed, contextualised record showing the analysis, action and outcome.                      |

## Measuring impact without inflating the claim

Begin with a small number of measures related to the project and the apprentice's learning. Useful measures might include report preparation time, the rate of avoidable rework, the age of unresolved decisions, forecast accuracy, acceptance at first review or stakeholder understanding. Choose measures that the team can collect consistently and interpret sensibly. A large set of poorly defined indicators creates more activity without improving the judgement about value. Establish a baseline before changing the process. Define the period, source, calculation and owner. Record other changes that may affect the result, such as a new system, staffing change or reduced workload. Then distinguish the apprentice's contribution from the whole project outcome. It is credible to say that the apprentice helped improve a reporting process; it is rarely credible to assign all organisational improvement to one learner without evidence. A balanced impact record includes quantitative and qualitative evidence. The apprentice may become more independent, communicate risk more clearly or gain the confidence to challenge a weak assumption. Support these claims with examples and feedback from people who observed the change. Ask whether the improvement is sustained and transferable to another task. One successful presentation is encouraging; consistent clarity across several stakeholder situations is stronger evidence of capability.

### Worked example: reporting efficiency

A hypothetical monthly report took six hours to prepare and two hours to check. After the apprentice standardised inputs and introduced controlled calculations, preparation takes four hours and checking takes one and a half hours. The observed saving is two and a half hours per cycle. At an illustrative internal cost of £30 per hour, this represents £75 of capacity per cycle, or £900 over twelve similar cycles. It is not automatically a cash saving: the employer must explain how the released capacity is used, account for implementation effort and confirm that report quality has not deteriorated.

- State the starting point and the period being compared.
- Use the same definition before and after the change.
- Record implementation effort and any continuing cost.
- Distinguish capacity released, cost avoided and cash actually saved.
- Explain the apprentice's contribution and the role of others.
- Include unintended effects and lessons, even where the overall result is positive.

## Gateway: an informed readiness decision

Gateway is the formal transition into independent assessment. Under ST0310 version 1.5, the employer must be satisfied that the apprentice is occupationally competent and ready, taking advice from KBC where useful. The assessment organisation checks the gateway requirements. The decision should be based on the apprentice's demonstrated capability across the standard, not solely on attendance, elapsed time or a desire to meet a planned completion date. The apprentice must confirm readiness, meet the applicable English and mathematics requirements, submit a project scoping document and submit the portfolio required for the professional discussion. The scoping document should be no more than 500 words and enables the assessment organisation to approve the title and scope. It is not itself assessed. The project must offer appropriate opportunities for the knowledge and skills mapped to the report method.

The timing of the project is important. The version 1.5 plan states that the research and workplace project are undertaken and completed during the programme before gateway. The written assessment report begins after gateway. Do not confuse the workplace project with the assessed report about it. The employer should help identify suitable work early, preserve access to evidence and avoid leaving project selection until the end of teaching. Check the start-date version before using this chapter as an assessment checklist. Version 1.5 is listed for new starts from 27 November 2025 to 27 January 2027. Skills England has published a revised assessment plan for new starts from 28 January 2027. The individual registration and the assessment organisation's guidance determine the applicable requirements; a new publication does not automatically move an existing apprentice to a different plan.

### Readiness conversation

Ask the apprentice to explain a recent decision about scope, schedule, budget, risk and stakeholders. Can they show their contribution, justify the approach and identify limitations? Then ask the coach which requirements remain insecure. If the apprentice has never applied a required skill, agree an appropriate work opportunity and review date. Signing readiness while acknowledging an unresolved competence gap creates avoidable risk for the learner.

## The written project report, presentation and questioning

For version 1.5, the first assessment method combines a written project report with a presentation and questioning. The report is 3,500 words with a ten per cent tolerance above or below. References, appendices and diagrams are excluded from that word count. The report and presentation materials must be submitted by the end of week twelve of the EPA period. The apprentice must complete the report and presentation unaided and explain their own contribution to the workplace project. The report should cover the project purpose and scope, objectives and performance measures, delivery schedule, cost estimate, changes, outcomes, findings and recommendations. It should explain whether intended benefits were delivered and what happened in relation to time and cost. A KSB mapping appendix is required. The report should analyse the work rather than merely describe the sequence of meetings. The apprentice needs to show why decisions were made and what the evidence means.

The presentation and questioning last sixty minutes, typically twenty minutes for the presentation and forty for questions. The assessor asks at least six questions, with a permitted extension of up to ten per cent to allow completion of a final point or response. The assessment organisation provides the practical arrangements and notice. The employer should provide a suitable environment and the agreed equipment, while ensuring the apprentice is free from distraction or assistance during assessment. During the learning phase, managers can help apprentices practise explaining projects, examine the quality of workplace analysis and build presentation confidence. Once the assessment report is under way, follow the assessment organisation's rules on assistance carefully. Do not write or substantially rewrite the report, script answers or supply analysis that the apprentice then presents as their own. Support should preserve independence as well as confidence.

### A useful analytical structure

For a hypothetical change decision, the apprentice explains the original requirement, the new information, the options, the chosen response, its approval and the resulting effect. They distinguish an observed outcome from an assumption about longer-term benefits. This structure demonstrates reasoning more clearly than a diary of events or an unsupported claim that the project was successful.

## The professional discussion and portfolio

The second version 1.5 assessment method is a sixty-minute professional discussion underpinned by a portfolio. The independent assessor asks at least six questions, with the plan permitting up to ten per cent additional time for a final response where necessary. The apprentice can refer to the portfolio during the discussion. The portfolio supports the conversation and the assessor's preparation; it is not directly assessed as a separate product. The portfolio is compiled during the programme and submitted at gateway. The plan says it will typically contain twenty discrete pieces of evidence, mapped to the KSBs assessed through the professional discussion. Quality and relevance matter more than treating twenty as a target to be filled with weak items. Evidence can cover more than one requirement. It may include workplace records, reports, presentations, direct-observation statements, annotated photographs and permitted video material, subject to the plan and assessment organisation's guidance.

Reflective accounts and self-assessment are excluded from this EPA portfolio. Employer contributions should describe direct observation, rather than opinion. The employer and apprentice must confirm that the evidence is valid and attributable to the apprentice. These requirements make early planning worthwhile. A well-written learning reflection may help development but cannot replace the required workplace evidence; a general reference from a manager does not establish that a particular skill was observed. Practise professional discussion during training by asking open questions about real work. Ask how the apprentice evaluated information, adapted communication, managed a risk or applied a relevant requirement. Follow with questions about alternatives and limitations. Avoid memorised scripts. An assessor may explore a different aspect of the evidence, and the apprentice needs the understanding to respond naturally.

- Use a clear portfolio index with concise descriptions and accurate mapping.
- Check that the apprentice's individual contribution is visible in team outputs.
- Confirm that confidential material is handled through an agreed assessment route.
- Retain access to the selected evidence and the tools needed to view it.
- Distinguish practice support from any assistance prohibited during the assessment itself.

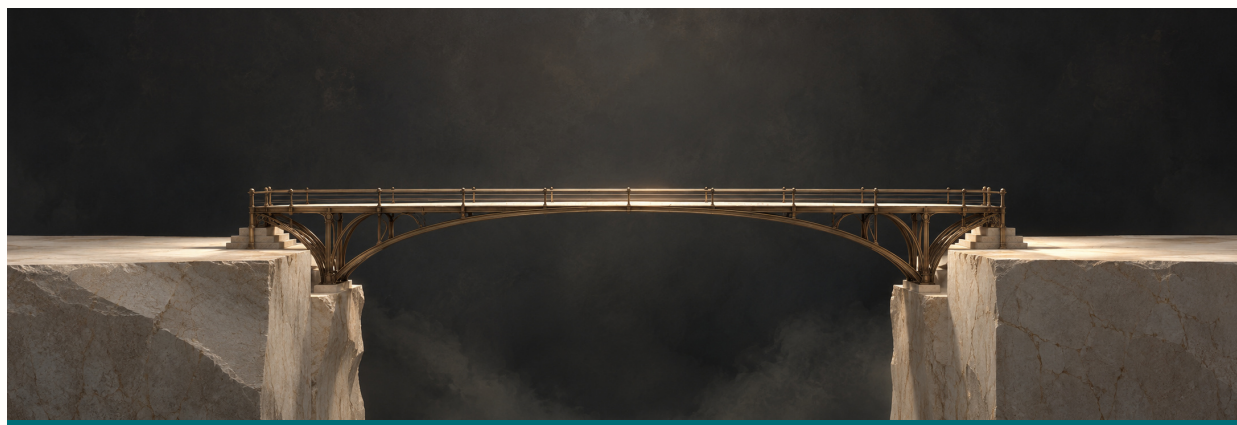
## Grades, setbacks and professional progression

Version 1.5 provides fail, pass and distinction outcomes. To pass overall, the apprentice must achieve at least a pass in both assessment methods. An overall distinction requires distinction in both methods. The independent assessor judges against the published criteria. Strong workplace performance and a well-prepared evidence set improve readiness, but no manager or provider can guarantee the grade. If an assessment method is unsuccessful, discuss the feedback with the apprentice and KBC. A re-sit does not require further learning; a re-take does. The employer must agree that the next attempt is appropriate, and the assessment organisation confirms the timing and requirements. Use a supportive action plan that addresses the actual gap. Repeating the same preparation without understanding the feedback is unlikely to improve the outcome.

Progression should be planned before completion. Identify the next responsibility that would build on the apprentice's competence: coordinating a more complex workstream, taking ownership of a small project, strengthening cost or planning capability, or supporting a PMO improvement. Discuss professional membership and continued development where relevant. The standard aligns with Association for Project Management Associate Membership, while PMP certification remains a separate PMI process. Close the learning journey with a balanced review of capability and impact. Ask what the apprentice can now do more effectively, where further experience is needed and which practices the team should retain. Recognise the contribution of the manager, mentor and project team. The lasting value of the apprenticeship lies in better professional judgement and stronger organisational practice, as well as the certificate.

### A progression discussion

A hypothetical apprentice completes the programme having improved reporting and coordinated a small implementation. Their next role includes ownership of a workstream budget and more complex stakeholder negotiations, supported by a senior project manager. Their development plan records these experiences and a separate check of professional certification eligibility. Progression is grounded in responsibility and experience rather than an automatic promise of a title.



## CHAPTER 04

# Making learning possible

Protected time, meaningful work and reviews that lead to action

## Off-the-job training: purpose before the number

Off-the-job training develops the occupational knowledge and skills the apprentice does not already possess. It takes place within the apprentice's normal paid working hours and is directly relevant to the apprenticeship. It can happen at the workplace, online or in another learning setting. The defining feature is new learning, rather than physical location. Routine productive activity does not become training simply because an apprentice performs it. Use the minimum training requirement and calculation applicable to the apprentice's standard, start date and individual circumstances. Do not apply a blanket twenty per cent rule or a universal weekly number from an older guide. At the September 2026 editorial check, the ST0310 version 1.5 public listing shows a minimum of 348 hours for compliance. This is not a substitute for the individual training plan, which must identify the learning actually required, account for prior learning and follow the applicable funding rules. The required learning can exceed a published minimum.

KBC's published delivery pattern includes two hours of live teaching each week, guided materials, monthly assignment work and monthly coaching, alongside periodic progress reviews. The plan should turn this pattern into a realistic schedule. A coaching conversation can include eligible new occupational learning, but routine progress checking, administration or a general welfare discussion should not automatically be recorded as training. Record the learning element accurately rather than counting the entire meeting without distinction. The employer and KBC should explain these distinctions clearly at induction. If an activity is uncertain, ask the coach before recording it. The goal is a truthful account of relevant learning, supported by evidence. Filling an hours target retrospectively with vague descriptions weakens both the apprentice's development record and the employer's confidence in the programme.

### Distinguishing work from learning

A hypothetical apprentice updates a familiar status report in forty minutes. That routine update is productive work. Later, a planner teaches them a new method for analysing schedule dependencies; the apprentice practises it and receives feedback. That planned development may be relevant off-the-job training. Applying the method repeatedly afterwards is useful work experience, but each repetition does not automatically become new training.

## Building a realistic working-week agreement

Begin with the apprentice's working pattern and project commitments. Identify the live session, guided study, assignment activity and any planned workplace learning. Put protected blocks in the calendar and tell colleagues how urgent work will be covered. If the apprentice supports several managers, one person should own the capacity decision. Otherwise every project may assume that the same learning time is available for its urgent tasks. A useful agreement states how learning will be accommodated during a busy week, not only in an ideal week. Decide which work can be delegated, what constitutes a genuine emergency and how a displaced learning block is rearranged promptly. Repeated displacement is a planning problem that needs escalation. It should not become an expectation that the apprentice routinely studies unpaid in the evening to compensate for work pressure. Plan assignments as learning activities rather than treating them as a separate burden after work. If the apprentice is studying risk analysis, schedule access to a suitable risk review and time to develop the related work. This does not mean labelling the whole project as off-the-job training. It means identifying where new learning occurs, protecting that time and enabling practical application afterwards.

| Planning question                       | What to agree                                                                             |
|-----------------------------------------|-------------------------------------------------------------------------------------------|
| When does learning happen?              | Protected paid-time blocks for the agreed delivery pattern and planned assignments.       |
| Where can the apprentice concentrate?   | A suitable room or remote environment, equipment and access to required materials.        |
| Who covers urgent work?                 | A named colleague or escalation route, with realistic limits.                             |
| What happens when a block is displaced? | A prompt replacement arrangement agreed with the apprentice and coach.                    |
| How is workload reviewed?               | A brief recurring check using actual missed time, deadlines and upcoming project demands. |

### A capacity conversation

In a hypothetical implementation month, the apprentice has two major delivery deadlines and an assignment. The manager reviews the work before the week begins, delegates routine reporting and protects a learning block linked to the live change-control activity. The assignment becomes relevant to current work, while the apprentice still has time to understand and analyse it. The manager has changed capacity, rather than simply advising better time management.

## Recording learning that another person can understand

A useful learning record states the date, duration, activity, new learning and connection to the standard. It also points to appropriate evidence. “Worked on project” is too vague. “Learned how to assess schedule dependencies with the planner, practised on the testing work package and corrected two missing links following feedback” explains the development. The record should distinguish teaching, practice and routine work where these occur within the same period. APTM is the central apprenticeship record used in KBC’s established delivery model. Learning-platform activity, attendance, assignments and coaching records can support it, but a system timestamp alone does not explain what was learned. The apprentice should maintain records regularly while the activity is fresh. The manager can confirm workplace context and protected time; the coach should evaluate occupational relevance and the quality of the evidence.

| Record element    | Illustrative entry                                                                                      |
|-------------------|---------------------------------------------------------------------------------------------------------|
| Date and duration | 14 October, 90 minutes of planned learning.                                                             |
| Activity          | Guided session with the project planner and supported practice on a live work package.                  |
| New learning      | How dependency types and resource constraints affect a completion forecast.                             |
| Application       | Reviewed the testing sequence and identified an assumption requiring confirmation.                      |
| Evidence          | Annotated schedule extract and tutor or mentor feedback stored in the agreed location.                  |
| Follow-up         | Confirm specialist availability and explain the resulting schedule change at the next coaching meeting. |

Do not ask the apprentice to disclose unnecessary personal information in a learning log. Welfare records and sensitive support discussions belong in appropriate restricted systems. Similarly, project evidence should respect commercial confidentiality. A concise description and an authorised, redacted extract can often preserve the learning evidence without sharing an entire customer or employee record. Review records for quality and plausibility. Repeated identical entries, large unexplained blocks of time or sudden retrospective totals should prompt a supportive check. The aim is to understand whether

learning occurred and improve recording, not to encourage more convincing wording for unsupported hours. If a gap exists, KBC should agree how it will be addressed through real learning and an accurate plan.

## Designing work that grows with the apprentice

Plan a sequence of work opportunities across the programme. Early tasks should develop understanding and confidence; later tasks should require more independent judgement and coordination. The apprentice needs exposure to the full range of the occupation, including areas that may not sit naturally in their current routine. Use the KSB planning map in Chapter 3 to identify opportunities and constraints. A bounded workstream is often a strong learning environment. It has a real objective, a manageable scope, stakeholders, a schedule, resources and outcomes, while remaining within the apprentice's authority. The apprentice can see how decisions connect across the lifecycle. Where one project cannot provide sufficient breadth, use several coherent activities and make their relationship to the standard explicit. Review work allocation when priorities change. A cancelled project can remove evidence opportunities months before anyone notices a formal progress gap. Ask the apprentice and coach what capabilities the new work will develop and what is now missing. Re-plan early rather than attempting to recreate a whole lifecycle at gateway.

- For a new project: involve the apprentice in the brief, requirements, stakeholder analysis and planning, then increase responsibility through delivery.
- For an established project: give them a defined improvement, change or reporting responsibility, with access to the decisions behind it.
- For a short project: retain access to closure, lessons and benefits information after delivery, and identify the next opportunity early.
- For a confidential project: agree evidence access and redaction with the appropriate owner before work begins.
- For a role with narrow duties: arrange a structured contribution to another project, supported by a named colleague and learning purpose.

### Turning a narrow role into an opportunity

A hypothetical apprentice spends most of the week preparing meeting packs. The manager arranges responsibility for the decision log, analysis of overdue decisions and a small improvement to the approval process. The apprentice observes governance, interviews users of the pack and tests a revised format. This broadens the role into information management, stakeholder engagement and performance improvement while retaining productive work.

## Monthly coaching and ten-weekly tripartite reviews

KBC's published model distinguishes monthly coaching from the tripartite progress review, normally scheduled around every ten weeks. Monthly coaching gives the apprentice structured support with learning, evidence, application and next steps. The tripartite review brings the employer, apprentice and coach together to assess progress in the workplace and agree the conditions for further development. The individual plan confirms the schedule and any additional support meetings. Prepare for a review with a small set of relevant evidence. The apprentice brings examples of new learning and application; the manager brings observations of performance and upcoming work opportunities; the coach brings the assessment of progress and any gaps. Review previous actions first. If an action was not completed, understand why before creating another list. A meeting that repeatedly carries the same barriers forward is not delivering its purpose. Make the apprentice an active participant. Ask them to explain their work before others judge it, and check that they understand the agreed actions. A review should not become a conversation about the apprentice while they remain silent. It should also allow a private support conversation where appropriate; sensitive information need not be discussed in detail in front of the employer to ensure that support is arranged.

| Review topic                   | What to establish                                                                   |
|--------------------------------|-------------------------------------------------------------------------------------|
| Progress since the last review | What the apprentice understands or does more effectively, with examples.            |
| Workplace application          | How learning has influenced real work and what the manager observed.                |
| KSB coverage                   | Which capabilities are becoming secure and which need more opportunity or practice. |
| Learning time and engagement   | Whether the plan is being delivered and what is preventing participation.           |
| Support and wellbeing          | Any barrier requiring a confidential follow-up or agreed adjustment.                |
| Business impact                | What changed, how it was measured and the apprentice's contribution.                |
| Next steps                     | A small number of specific actions with owners, dates and success criteria.         |

## Actions that make the next review better

An effective action identifies a development need, a practical activity, an owner, a date and evidence of success. “Improve communication” is too broad. “By the next steering meeting, prepare a one-page decision brief for the supplier delay, check it with the project manager and present the options; the manager will provide feedback on clarity and the decision requested” gives everyone something concrete to do. Use a manageable number of actions. Three well-chosen priorities are often more useful than a long list that competes with normal work. Include employer and provider actions as well as apprentice actions. If the apprentice needs budget experience, the employer may need to arrange finance access; if they misunderstand a concept, the coach may need to provide targeted teaching. An action plan that assigns every problem to the apprentice can conceal a lack of opportunity or support. Measure the effect of support. If a quiet learning space is provided, check whether participation improves. If a mentor explains forecasting, check whether the apprentice can apply the concept to another example. If work is reallocated, check that the intended opportunity actually occurs. This closes the loop between an agreed action and an improved learning experience.

### Worked review action

A hypothetical apprentice understands risk scoring but produces weak response plans. The apprentice will revise two live risks to include a specific response, owner, trigger and review date. The manager will arrange a discussion with the risk owners and confirm the practical feasibility of the responses. The coach will question the apprentice about the reasoning and review the revised evidence. The next review will check whether the responses were implemented and what changed.

- Ask what the apprentice will be able to do differently when the action is complete.
- Identify the person who can remove the barrier, not merely the person experiencing it.
- Agree a date that fits the project and learning sequence.
- Record the evidence that will show whether the action worked.
- Escalate persistent barriers promptly instead of waiting for the next scheduled review.



## CHAPTER 05

# The employer voice

Quality, early intervention and accountable improvement

## Monitor the experience, not just the dashboard

A progress system can show attendance, submissions, learning records and assessment information. These indicators are useful starting points, but they do not explain the whole experience. An apprentice may attend every session while struggling to apply concepts, or submit good work while losing access to important workplace opportunities. Combine the information KBC shares with direct observation, conversations and evidence of application. Use a balanced view of progress. Engagement concerns include missed sessions or unanswered communication. Learning concerns include persistent misunderstanding or weak analysis. Workplace concerns include narrow duties, unavailable data or repeated loss of protected time. Wellbeing concerns may appear as a change in confidence, behaviour or participation. These categories can overlap, but they require different questions and different support. Do not use a wellbeing score as a general performance ranking or share sensitive information automatically with every manager. The relevant support arrangements and information-sharing basis should be clear. Usually, the employer needs to understand what adjustment or action is required, rather than receive the details of a confidential conversation. Respecting privacy can make it easier for an apprentice to seek help early.

| Signal                                   | A question to ask                                                                | A proportionate response                                                       |
|------------------------------------------|----------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Repeated missed learning                 | Is work allocation, access, understanding or wellbeing preventing participation? | Identify the cause, protect time and agree supported catch-up.                 |
| On-time but weak submissions             | Does the apprentice understand the task and underlying concept?                  | Arrange feedback, targeted teaching and a further application opportunity.     |
| Little new workplace evidence            | Has the role provided the required opportunity?                                  | Agree a specific work activity, access and an informed mentor.                 |
| A sudden change in engagement            | Is there a concern the apprentice needs to discuss privately?                    | Offer a supportive conversation and use the appropriate support route.         |
| High confidence but little justification | Can the apprentice explain decisions and limitations with evidence?              | Use practical questioning and observation to assess the real development need. |

### What the number did not show

A hypothetical dashboard shows two late assignments. A conversation reveals that the apprentice's role changed and they no longer have access to the project evidence needed. The manager arranges an alternative workstream and the coach revises the activity. Treating the signal as poor motivation would have left the real barrier unresolved.

## A supportive early-intervention process

Respond to a concern while there is still time to make a useful change. Start with observable facts and an open question. "You missed two sessions and have not uploaded the agreed analysis; what is getting in the way?" invites an explanation. Avoid assuming that the cause is unwillingness. Workload, a learning difficulty, unclear expectations, inaccessible technology or a personal concern may require different support. Agree a small recovery plan with the apprentice and KBC. Identify what must be learned, which deadlines need review, what support will be provided and how progress will be checked. The plan should be realistic alongside work. Requiring an apprentice to complete several months of missed learning in a few days may increase anxiety without restoring competence. If the planned programme is no longer achievable, seek a formal review of the individual plan. Use an earlier follow-up than the next routine review. A brief check after the agreed action can establish whether the barrier has been removed. Record what changed and what remains unresolved. If the apprentice is not responding and there is a potential welfare concern, use KBC's engagement and safeguarding procedures promptly. Do not wait for an arbitrary number of missed sessions where the circumstances indicate a more urgent concern.

### A four-part intervention

In a hypothetical case, the apprentice is behind on budget analysis. The cause is uncertainty about cost categories and restricted access to the finance system. The employer arranges an authorised extract and a finance mentor; the coach provides a focused explanation; the apprentice analyses one work package; all parties review the result the following week. The plan addresses access, knowledge and application together.

- State the concern using dates and examples.
- Ask for the apprentice's explanation and identify any need for a private conversation.
- Agree actions for the employer and KBC as well as the apprentice.
- Set a prompt review date and a clear sign of improvement.
- Escalate if the barrier persists, the risk increases or specialist support is needed.

## When circumstances change

A change in role, employer, manager, working hours or location can alter the apprenticeship. Tell KBC promptly so that learning opportunities, eligibility, support and dates can be reviewed. A move that looks like a promotion may reduce access to some required activities; a temporary assignment may create new opportunities but remove protected time. The training plan should reflect the actual role rather than an outdated description. Extended absence or a serious personal circumstance may require a formal break in learning or another adjustment. A break is a managed change to the programme, not simply a period in which assignments stop arriving. KBC's compliance team should confirm the appropriate process, records and return arrangements under the rules that apply. On return, review the apprentice's current knowledge, access and work opportunities before expecting the previous schedule to resume unchanged.

If employment ends, contact KBC immediately with the relevant facts and dates. Redundancy, resignation and other circumstances can have different consequences. Avoid relying on a general rule quoted from another learner's case. The compliance team should determine the options using the applicable funding rules and individual circumstances. The employer can help by providing accurate documentation and responding promptly to requests for confirmation. A project cancellation should trigger a learning-opportunity review even if employment continues. Identify what evidence and experience remain useful, what is no longer available and which work can replace it. Preserve records that may otherwise be lost when a project workspace closes. Keep the apprentice involved in the review so that they understand the changes and can contribute ideas.

### A managed return

A hypothetical apprentice returns after an agreed break. Their original project has closed and the manager has changed. KBC and the employer hold a return meeting, refresh the learning plan, identify a new workstream and confirm system access. They agree a short period of supported practice before resuming more demanding tasks. The return is treated as a transition requiring support, rather than a simple change of attendance status.

## Feedback that leads to a better programme

Employer feedback is most useful when it explains a practical experience and its effect. "The module was good" signals satisfaction but gives limited direction. "The risk workshop helped the apprentice distinguish threats from issues; we would benefit from more examples of supplier response planning" identifies both value and an improvement. Provide feedback through the channels KBC offers, including reviews, surveys, employer discussions and direct contact. Comment on curriculum relevance, teaching, coaching, communication, support and workplace impact. Distinguish the apprentice's performance from the quality of the provision. A learner may be progressing well despite a communication problem, or struggle even where teaching is strong because the role lacks opportunity. Clear feedback helps the right person take action and avoids attributing every outcome to one cause. A useful quality-improvement cycle has five stages: gather evidence, identify the issue, agree an action, implement it and evaluate the effect. Ask KBC how feedback has been considered and what changed. Where no change is made, a reasoned explanation can still demonstrate that the feedback was heard. Some employer preferences may conflict with the occupational standard or the needs of other learners; the provider should explain the balance.

### A feedback example

Several hypothetical employers report that apprentices understand dashboards but struggle to define the underlying measures. KBC adds a practical exercise on data definitions and validation before dashboard construction. Employers then review whether later reports contain clearer sources and assumptions. The improvement is demonstrated by changed work, not merely by recording that an extra lesson was delivered.

- Describe the experience, with an example and date where useful.
- Explain the consequence for learning, work or communication.
- Suggest a practical improvement while remaining open to alternatives.
- Ask how the action will be evaluated.
- Recognise effective practice as well as identifying a problem, so that successful approaches can be retained.

## Employer forums, industry dialogue and curriculum influence

Employer engagement can improve the programme beyond the experience of one apprentice. Forums and consultations allow employers to discuss changing skills needs, the relevance of activities and the realities of project work in different sectors. They also give KBC a way to test whether its curriculum examples and delivery arrangements remain useful. Participation is an opportunity to shape provision, not a requirement to promote the programme uncritically. Bring concrete challenges from your organisation. For example, project teams may need stronger understanding of benefits ownership, data quality, supplier coordination or the safe use of AI. Explain what employees need to do differently and what evidence would show improvement. This helps translate a broad trend into a teachable capability. An employer request for “more AI” is less useful than a request for apprentice practice in checking generated summaries against source records.

Forums can also help employers exchange approaches to protected learning, mentoring and work allocation. A small organisation may learn how to create breadth without a formal rotation; a larger organisation may learn how to coordinate several project managers around one apprentice. Share examples in a way that respects confidentiality and avoids disclosing personal learner information without an appropriate basis. Use current KBC invitations for dates, locations and access arrangements. Event schedules, travel support and included benefits may vary by cohort. Confirm the current arrangements before committing expenditure or telling an apprentice that a cost will be covered.

### A question for the employer forum

“Our apprentices can produce risk registers but find it difficult to challenge weak response ownership. Could the programme include a realistic risk-review exercise, followed by a workplace activity in which the employer observes how the apprentice obtains commitment from risk owners?” This request connects an industry need, a learning activity and evidence of transfer.

## Governance, challenge and an honest account of quality

Good governance provides oversight of quality, risks and outcomes and holds management accountable for improvement. Employer perspectives help test whether the programme remains relevant and whether reported progress reflects workplace experience. Governance should be distinct from day-to-day delivery management, even though both need accurate information and clear responsibilities. Employers may contribute through formal representation, consultation or the evidence they provide through routine engagement. Useful oversight considers more than achievement rates. It asks whether apprentices are learning the intended curriculum, whether support is effective, whether employers provide suitable opportunities and whether groups experience different barriers. It examines the quality of teaching, assessment and feedback, as well as the accuracy of records and the response to concerns. Positive outcomes should be supported by evidence, and weaknesses should lead to action rather than be hidden by aggregate results.

If asked about the apprenticeship during a quality review or inspection, describe your actual experience. Explain what the apprentice has learned, how you support paid learning time, what changed in the workplace and how KBC responded to feedback. Use examples you can verify. There is no need to memorise an ideal answer. A balanced explanation of a problem and an effective response can demonstrate stronger partnership than an unsupported claim that everything has always been perfect. Raise a serious quality concern through the appropriate route rather than relying on a future forum. Routine matters may be resolved with the coach or programme team; persistent or significant issues need senior review. Safeguarding concerns require the safeguarding route, and assessment appeals follow the relevant assessment organisation's procedure. Clear routing ensures that the concern reaches someone who can act.

### Questions that strengthen oversight

- What has changed in the apprentice's capability?
- Which employers or learners are experiencing barriers?
- What evidence shows that an intervention worked?
- Are reported benefits attributable and credible?
- How has employer feedback changed delivery?
- What risk remains unresolved, and who is responsible for addressing it?



## CHAPTER 06

# A safe and inclusive apprenticeship

Wellbeing, professional values and wider development

## Safeguarding is part of the learning environment

An apprentice needs to feel safe, respected and able to seek help in order to learn effectively. Safeguarding concerns can arise in the workplace, online, during travel or in personal circumstances. They may involve abuse, exploitation, harassment, bullying, radicalisation or other risks to welfare. KBC's safeguarding arrangements support apprentices throughout the programme, and the employer contributes by maintaining a safe workplace and responding appropriately to concerns. A line manager is not expected to investigate a safeguarding concern or become a specialist adviser. Your role is to listen, take the concern seriously, record relevant facts accurately and report through the appropriate route. Do not promise absolute secrecy. Explain that information may need to be shared with the people who can help keep the apprentice safe. Share only what is necessary and follow the organisation's safeguarding procedures. If there is immediate danger or an emergency, use emergency services and the relevant workplace response. For other concerns, contact KBC's safeguarding team promptly and follow the instructions provided. Do not wait for the next progress review. If the concern involves the apprentice's manager or another person in the usual reporting line, the apprentice must have an alternative route that does not depend on that person's permission.

### Responding to a disclosure

In a hypothetical conversation, an apprentice says a colleague has sent threatening messages. The manager listens without pressing for unnecessary detail, checks immediate safety, explains the next step and records the apprentice's words as accurately as possible. They contact the safeguarding lead and appropriate employer function. They do not confront the alleged person or attempt to conduct an informal investigation before seeking advice.

- Know the safeguarding contact and an alternative route before a concern occurs.
- Make reporting information accessible to remote and site-based apprentices.
- Maintain professional boundaries in messages, meetings and mentoring.
- Treat unexplained changes in behaviour as a reason to check in, without making assumptions.
- Keep sensitive records in restricted locations and follow the agreed reporting process.

## Wellbeing, workload and psychological safety

Apprentices balance employment, study and personal responsibilities. The employer can reduce avoidable pressure through realistic work allocation, clear priorities and supportive communication. A regular check-in should provide space to discuss workload and support, as well as deadlines. Ask what is manageable, what is becoming difficult and what change would help. The aim is to identify practical barriers early, not to require the apprentice to disclose private medical information. Psychological safety in a project team means that people can ask a question, admit uncertainty or report a mistake without humiliation. It does not remove accountability. It makes it easier to identify risks and correct errors while they are still manageable. Model this by acknowledging your own uncertainties, thanking people for raising concerns and separating a problem from a judgement about the person. A change in participation may have several explanations. Avoid diagnosing the apprentice or treating a wellbeing concern as proof of poor performance. Offer a private conversation and signpost the appropriate support. Where a support plan affects work, agree the practical arrangement and the information that needs to be shared. KBC and the employer should coordinate within their responsibilities, with the apprentice involved wherever appropriate.

### A workload adjustment

A hypothetical apprentice is struggling during a major project deadline and has begun missing coaching. The manager and apprentice review tasks, defer a lower-priority deliverable and protect the next learning sessions. The coach agrees a realistic submission plan. The employer checks whether the changes help, rather than assuming that a wellbeing conversation alone has resolved the pressure.

- Ask about the effect of the workload, not just the number of tasks.
- Provide clear priorities when several project managers request work.
- Avoid normalising routine unpaid catch-up as the solution to lost learning time.
- Offer confidential support routes and respect the apprentice's dignity.
- Check whether an agreed adjustment works in practice and revise it if needed.

## Equality, inclusion and access to opportunity

An inclusive apprenticeship gives the learner fair access to teaching, workplace experience and progression. Equality is not achieved simply by offering everyone the same arrangement if that arrangement creates avoidable barriers for some people. The employer and KBC should identify needs early, discuss appropriate adjustments and review whether support is effective. The apprentice should be able to request help without being treated as less capable or less committed. Consider the practical conditions of learning: the readability of documents, captions or transcripts where available, the accessibility of meeting tools, a suitable workspace and the timing of activities. Some apprentices benefit from instructions in writing, advance access to an agenda, shorter steps or a quiet environment. An adjustment should address a real barrier while preserving the occupational competence being developed and assessed. Assessment adjustments must be agreed through the assessment organisation's process. Access to meaningful work also needs attention. Do not repeatedly allocate visible presentations to the most confident person and routine support tasks to the apprentice who needs practice. Provide supported opportunities to develop. Review whether remote workers, part-time staff or people with caring responsibilities can access project discussions and professional networks. Fairness includes the opportunity to gain the experience needed for progression.

### **An inclusive presentation opportunity**

A hypothetical apprentice understands a project analysis but becomes overwhelmed by an unstructured meeting. The manager provides the agenda in advance, agrees the section the apprentice will present and offers a practice discussion. The apprentice still explains and defends their own analysis. The support removes an avoidable barrier while developing the required communication skill.

- Ask what helps the apprentice participate and demonstrate their understanding.
- Check that important information is not available only through informal office conversations.
- Give feedback on the work rather than assumptions about background, accent or confidence.
- Review the allocation of challenging and visible tasks.
- Agree adjustments with the relevant people and evaluate their effect.

## Ethical project practice and responsible information

Project managers handle information that can affect employees, customers, suppliers and communities. Your apprentice should understand the employer's rules for confidentiality, data access, retention and sharing. They should know which information can be used in learning and assessment, and how approval or redaction is arranged. "It is for college" is not a sufficient reason to copy a confidential project folder into a personal account or an unapproved AI tool. Teach the apprentice to identify ethical tension. Examples include pressure to report a milestone as complete without evidence, preference for a supplier without a fair process, concealment of a known defect or use of personal data beyond the agreed purpose. The appropriate response is to establish facts, seek advice and use the authorised route. The apprentice should not be left to carry a significant ethical decision alone. Sustainability is also part of professional judgement. Ask the apprentice to consider the effect of project options on resource use, waste, travel, long-term operation and affected people. A low initial price may carry higher maintenance or environmental consequences. The apprentice can contribute evidence and questions while specialists and authorised decision-makers determine the final approach. Avoid unsupported claims that an option is sustainable merely because it is digital or labelled green.

### A confidential evidence decision

A hypothetical apprentice wants to use a project cost report in their portfolio. The manager identifies commercially sensitive rates and customer details. With KBC and the relevant information owner, they agree a redacted extract that retains the structure and analysis needed to show the apprentice's contribution. The apprentice records the source and redaction approach. This protects information without removing all meaningful evidence.

- Which information is necessary for this learning or assessment purpose?
- Who owns it, and what approval is required?
- Could the same learning be demonstrated through an authorised extract?
- What ethical or sustainability consequence should the decision-maker consider?
- How will the apprentice report a concern if normal project pressure discourages challenge?

## Online safety, site work and professional boundaries

Remote learning and digital collaboration create practical safety responsibilities. Apprentices should use approved accounts, protect authentication details and understand how to report suspicious messages or access problems. They should know which channels are appropriate for work, learning and confidential support. Managers and mentors should maintain professional boundaries, including the timing and content of messages and the arrangements for one-to-one contact. Where project work involves site visits, customer premises or travel, confirm the relevant induction, supervision and risk arrangements. The apprentice's development needs do not remove normal health and safety responsibilities. Ensure they know whom to contact if plans change, access is refused or an activity feels unsafe. Do not place them in an unfamiliar technical environment without the appropriate briefing and competent supervision. Online professional behaviour includes respectful discussion, accurate representation of others' views and care when sharing screenshots or recordings. A meeting recording may contain personal or commercially sensitive information. Follow the employer's policy and applicable permissions before using it for learning or evidence. Where AI tools analyse meeting material, the same confidentiality and accuracy considerations apply.

### A safer digital workflow

A hypothetical apprentice receives a message asking them to upload the project register to an unfamiliar link. They pause, verify the request through an established channel and ask the project manager about the approved sharing method. The team confirms the link was not authorised. The apprentice's willingness to check is recognised as professional judgement, rather than criticised as slowing the work.

- Explain the approved tools and channels at induction.
- Check access permissions when roles or projects change.
- Provide a clear route for reporting suspicious activity or accidental disclosure.
- Agree appropriate supervision for unfamiliar locations and tasks.
- Make it acceptable to pause and seek advice when a request appears unsafe or inconsistent with policy.

## Enrichment that returns value to the workplace

Masterclasses, professional events, peer discussions and networking can extend the apprentice's perspective beyond their immediate project. They can expose the learner to different sectors, delivery methods and professional challenges. The value depends on purposeful participation and follow-up. Attending an event is an opportunity; explaining what was learned and applying a useful insight demonstrates development. Before an event, ask the apprentice to identify one question related to their current work. Afterwards, discuss the answer, the relevance to the organisation and a proportionate next step. They might share a short briefing, test a method on a suitable task or compare a new approach with existing practice. Encourage critical evaluation. A technique presented confidently by a speaker may still be unsuitable for the employer's context.

Networking is a professional skill that can be developed gradually. An apprentice may begin by asking a prepared question, discussing a shared challenge with a peer or following up a useful conversation through an appropriate channel. Help them understand confidentiality and professional courtesy. The aim is to build perspective and relationships, rather than to collect contacts or make unsupported claims about expertise. Confirm each event's current arrangements, including attendance, accessibility, travel and any included costs. Do not assume that all professional activities count as off-the-job training; the coach should confirm whether the activity develops relevant new occupational learning and meets the applicable conditions. Wider development can still be valuable even where it is recorded separately.

### **From masterclass to practice**

A hypothetical apprentice attends a session on decision-focused reporting. They return with a proposal to separate information items from decisions in the weekly project pack. With the manager's approval, they pilot the format for two meetings and ask participants whether the requested decisions are clearer. The resulting feedback and revised pack show a practical learning transfer.

## **Building a continuing professional development habit**

Professional development continues after the apprenticeship. Encourage the apprentice to keep a concise record of learning needs, activities, application and reflection. The most useful continuing professional development record shows a cycle: identify a need, undertake learning, apply it, evaluate the effect and decide the next step. A list of attended events without application gives a limited view of development. Use project experience to generate learning priorities. A difficult negotiation may lead to study and supported practice in stakeholder management; a weak forecast may lead to further cost-control learning; a successful automation may reveal a need for stronger data governance. This makes development responsive to professional practice. It also helps the apprentice recognise that competence includes knowing when to seek expertise. Where a professional body or certification has specific continuing development requirements, the apprentice should check the current rules directly. Employer-supported learning can contribute to such requirements only where the body accepts it. The apprenticeship, PMP preparation, APM membership and other professional routes should be discussed as connected opportunities with distinct conditions, rather than a package of automatically awarded titles.

- Identify one development priority from each substantial project review.
- Record what changed in practice after a learning activity.
- Seek feedback from colleagues with different perspectives.
- Include ethical judgement, communication and inclusion alongside technical methods.
- Review progression ambitions against the experience and evidence still needed.



## CHAPTER 07

# Questions employers actually ask

Decisions, exceptions and worked management scenarios

## Who is this programme suitable for?

The programme can suit an employee developing Associate Project Manager capability in a genuine project role. They may be a project coordinator, assistant project manager, workstream lead or another employee with suitable responsibilities. The important questions are whether there is substantial new learning and whether the role offers the breadth of work needed for the standard. A new recruit and an experienced employee may both be suitable, but for different learning reasons. KBC should assess prior learning and experience before confirming the programme. A degree, professional qualification or long employment history does not automatically make someone ineligible, nor does a low self-rating prove that they need the full programme. The assessment should consider the actual knowledge and skills already held. If the person is already competent across the occupation, repeating it is unlikely to be the right development choice. If the role is too narrow, redesigning the work may be necessary before enrolment. For an employer, the useful preparation is a current role description, examples of project work, an outline of the employee's experience and a realistic account of future opportunities. Do not write a role description that promises responsibilities the organisation cannot provide. Suitability needs to be true in practice throughout the apprenticeship.

## Can a small organisation provide enough experience?

Yes, a small organisation can offer rich project experience because an apprentice may see the whole lifecycle and work closely with decision-makers. The challenge is breadth and support. If the same person handles finance, procurement and project sponsorship, the apprentice still needs to understand the different responsibilities and controls. A proportionate process can be professionally sound without reproducing the paperwork of a large organisation. Identify a real project with a clear objective and measurable outcome, then map the likely work to the standard with KBC. Arrange access to specialist advice where needed. For example, a finance colleague or external accountant might explain cost information, while a technical lead supports quality criteria. If there is no opportunity to demonstrate a required capability, discuss an appropriate additional activity or role arrangement early. Classroom knowledge alone cannot replace all workplace application.

### A small-business example

A hypothetical charity introduces an appointment system. The apprentice can help define needs, compare options, plan implementation, coordinate volunteers, monitor costs, manage risks and evaluate adoption. The project is modest in scale but offers meaningful occupational breadth. Its suitability depends on genuine responsibility and evidence, not the size of the budget.

## What if the apprentice works on several projects?

Several projects can provide useful breadth, but fragmented work can make learning and evidence difficult to follow. Agree one principal learning thread or a small number of coherent work packages. The apprentice should be able to explain each context, their responsibility and the result. A portfolio made from isolated screenshots across many projects may show activity without demonstrating sustained judgement. One manager should coordinate the apprentice's capacity and development priorities. Project managers need to know the protected learning arrangement and the limits of the apprentice's availability. Use reviews to decide which upcoming activity best addresses a learning gap. If every project claims priority, escalate the conflict rather than expecting the apprentice to negotiate it alone. For the EPA project, follow the applicable assessment plan and obtain approval of the scope through the assessment organisation. A collection of unrelated tasks should not be assumed to meet the requirements for a significant, defined piece of work. Discuss suitability with KBC well before gateway so that the workplace project can be completed and the relevant evidence retained.

## Can routine work ever support the apprenticeship?

Routine work is part of employment and can provide a context for new learning. The distinction is the development taking place. Learning a new forecasting method, receiving feedback on its first application and evaluating the result may support occupational development. Repeating a familiar report each week without new learning does not become off-the-job training simply because it is included in the job. Ask whether the activity requires the apprentice to understand something new, exercise a developing skill or respond to a more demanding context. Then identify the learning element and appropriate evidence. A task that was challenging in month one may be routine by month six. This is a sign that the role should progress, not a reason to keep recording the same activity as new training. The manager can create development by adding responsibility for analysis, improvement or stakeholder engagement. For example, after the apprentice learns to maintain a risk register, ask them to evaluate the quality of responses and coordinate a review. Keep the challenge proportionate and ensure that any formal training record follows the applicable rules.

## What happens if live sessions conflict with work?

Tell the coach and manager promptly and use the agreed catch-up process. A recording may support learning, but it should not be treated as an automatic equivalent to participation without checking what was missed and how understanding will be demonstrated. Some activities depend on discussion, practice or feedback that require an additional arrangement. The individual delivery plan should explain the available flexibility. An occasional genuine conflict can be managed. Repeated clashes indicate a capacity or scheduling issue that the employer and KBC should address. Review who is allocating the work, whether the learning block is visible and whether a deputy can cover urgent activity. The apprentice should not be expected to solve a structural conflict through routine unpaid study. Where a role has variable shifts or unavoidable site commitments, discuss the pattern before enrolment and keep it under review. A workable flexible arrangement still requires planned paid learning time, reliable engagement and evidence of development. Flexibility changes how learning happens; it does not remove the commitment to learn.

## Does the apprenticeship automatically include PMP certification?

No. KBC's published route includes PMP preparation, but PMI controls certification. The apprentice must meet PMI's current eligibility requirements, submit the required application and pass the examination to earn the award. The relevant experience and training requirements depend on the applicant's route. The employer and apprentice should check these directly with PMI and confirm the professional preparation and examination support included in the KBC offer. Do not assume that completion of a 12-month apprenticeship supplies all experience required for PMP eligibility. An apprentice may have relevant prior experience, or they may need further project leadership experience before applying. A sensible plan separates apprenticeship competence, professional exam readiness and eligibility. Each can progress at a different pace. Similarly, a successful PMP examination does not replace the apprenticeship EPA. The occupational assessment requires the apprentice to demonstrate the relevant standard through the applicable assessment methods. Keeping the processes distinct prevents confusion about deadlines, evidence and employer support. Professional study should strengthen the apprenticeship experience while the required occupational learning remains central.

## How are funding and employer costs confirmed?

KBC should confirm eligibility, the agreed training and assessment price, the applicable funding arrangements and any employer contribution in the individual documents. Funding depends on the rules in force for the apprentice and employer, so a general marketing statement should not be used as a personal entitlement decision. The public funding-band maximum is a limit on eligible funding, not automatically the negotiated price or a promise that all related expenditure is covered. Ask for a clear distinction between funded apprenticeship training and assessment, employer responsibilities such as wages and learning time, and any separately agreed professional or additional services. Confirm what the KBC offer includes before booking an examination, purchasing resources or committing to travel. If prior learning changes the training required, the plan and price should be reviewed through the appropriate process. PMP preparation, PMO learning and Level 7 strategy and leadership are professional development components or additional qualifications; they should not be assumed to carry separate government apprenticeship funding. Where included in an agreed apprenticeship pathway or KBC-supported offer, the individual terms explain the scope, eligibility and funding. Do not assume that every additional qualification is independently government-funded or that its conditions are identical to those of the apprenticeship.

## Can confidential work be used as evidence?

Often it can, through an agreed and proportionate arrangement. Speak to the relevant information owner, KBC and the assessment organisation before copying or uploading material. Options may include authorised extracts, redaction or controlled access, depending on the requirements. The evidence must still show the apprentice's contribution and remain valid. Removing all context can make a document safe to share but useless for demonstrating competence. The employer should identify restrictions early enough to plan suitable evidence. A late discovery that the apprentice cannot use any project records can create an avoidable assessment problem. Do not ask the apprentice to bypass access controls, use a personal account or upload confidential material to an unapproved tool. Where a restriction cannot be resolved, KBC should help identify another appropriate evidence opportunity. Keep a record of what was authorised and how the evidence was prepared. Confirm that redaction has not changed the meaning or hidden a material limitation. The apprentice should be able to explain the original context without disclosing information they are not permitted to share.

## What if the project has an unsuccessful outcome?

An unsuccessful project does not automatically mean that the apprentice lacks competence. Projects may be stopped, delayed or changed for reasons outside their control. The important questions are how the apprentice contributed, what evidence informed decisions, how they responded to difficulties and what they learned. However, the selected EPA project and evidence must still meet the applicable assessment requirements. Discuss the situation with KBC before assuming that the work is unusable or sufficient. A cancelled initiative may provide strong evidence of business-case review, risk escalation and responsible closure, but may leave gaps in other capabilities. Another activity may be needed to demonstrate those areas. Avoid rewriting the narrative to make the project appear successful when it was not.

### **An honest project outcome**

A hypothetical pilot fails to achieve the expected adoption. The apprentice analyses the evidence, identifies that users were not involved sufficiently in design and recommends stopping the full rollout until requirements are reconsidered. The employer records the decision and the lesson. The apprentice's sound analysis may be valuable evidence even though the original benefit was not achieved.

## Can the manager help with assignments and assessment?

During learning, managers can explain workplace context, provide access to information, discuss professional practice and give feedback. Ask questions that develop the apprentice's reasoning rather than supplying a finished answer. The apprentice should acknowledge relevant assistance and retain ownership of their work. The coach can clarify the boundary for a particular assignment. Independent assessment has stricter requirements. For version 1.5, the apprentice must produce the written project report and presentation unaided. The assessment organisation's rules determine permitted support and use of tools. Do not assume that editing, rewriting or generating text is acceptable because the apprentice supplied the original ideas. If uncertain, ask before assistance is given. The employer still provides time, resources and a suitable environment. You may also support general confidence and practical arrangements without influencing the assessed response. The distinction protects the apprentice: a result should represent their competence and withstand questions about authenticity.

## How do we know whether the apprentice is ready?

Look for consistent application across the standard, supported by evidence and the coach's assessment. The apprentice should explain their decisions, identify limitations and act appropriately within their authority. Readiness is more than completing a set of documents. It includes the ability to respond to questions about why an approach was chosen and how it affected the work. Use a structured readiness conversation well before the planned gateway. Review outstanding learning, workplace gaps, evidence quality and the formal requirements. If a gap remains, identify whether it requires teaching, practice, opportunity or clarification. Then agree an achievable action and review date. A delay used for purposeful development is preferable to entering assessment with a known unresolved competence gap. For the current version described in this guide, the employer makes the occupational readiness decision and the assessment organisation checks gateway requirements. The apprentice also confirms readiness. KBC supports the process with advice and evidence, but no party should treat a signature as an administrative formality.

## Scenario workshop: five decisions for the line manager

Use the following hypothetical scenarios in an employer meeting or with the apprentice and coach. Each presents a different management decision. Discuss the reasoning before reading the suggested response. The purpose is to practise judgement, not to memorise a universal answer. The correct action in a real case depends on the facts, the individual plan and the applicable procedures.

### Scenario 1: the sponsor wants a greener report

A sponsor asks the apprentice to mark a delayed milestone as complete because most work is finished. The apprentice is unsure how to respond. A useful manager response is to check the agreed completion criteria, support accurate reporting and clarify the outstanding work and decision needed. If pressure continues, use the governance or ethical escalation route. The learning question is: how can we communicate the situation constructively while preserving the integrity of the record?

**Scenario 2: the learner has no budget access**

The apprentice has strong stakeholder evidence but cannot see any cost information. The manager should establish the reason for the restriction and explore an authorised extract or bounded budget activity with finance. KBC should assess whether the opportunity is sufficient. The learning question is: what information and responsibility are needed to develop budget analysis without granting unnecessary access? A fabricated budget should not be presented as genuine workplace evidence.

**Scenario 3: an AI summary changes a decision**

An AI-generated meeting summary states that a change was approved, but the meeting only agreed to investigate it. The apprentice should correct the record promptly, check the source, notify the relevant owner and review the validation process. The manager should examine why an unverified summary reached the decision log. The learning question is: what human check and source evidence must exist before information triggers project action?

**Scenario 4: a confident apprentice avoids challenge**

The apprentice speaks fluently about project methods but accepts weak assumptions without questioning them. The manager can select a real estimate or schedule and ask for evidence, alternatives and sensitivity to change. The coach can test understanding and plan further practice. The learning question is: what observable judgement would demonstrate competence beyond vocabulary and confidence?

**Scenario 5: the best project ends before gateway**

A suitable workplace project closes three months before the planned gateway. The manager should preserve records, obtain relevant direct-observation evidence and maintain access for later report preparation, while KBC confirms suitability and timing under the assessment plan. The apprentice must still complete required learning and should not write the assessed report prematurely. The learning question is: how do we preserve authentic evidence without confusing on-programme work with independent assessment?

## Questions to ask before making a difficult decision

When a situation does not fit a familiar example, use a short decision check. Establish the facts, identify whose responsibility it is, consider the effect on learning and safety, and seek the right advice. A manager does not need to know every funding or assessment rule from memory. They do need to recognise when a decision requires KBC's compliance team, the safeguarding lead, an employer specialist or the assessment organisation. Record the decision proportionately and communicate it to the people who need to act. If the answer depends on a rule, ask for the applicable version and keep the confirmation with the relevant record. This creates continuity when managers change and helps prevent an informal assumption from becoming an incorrect permanent practice.

- What do we know directly, and what are we assuming?
- Does the issue concern employment, learning, assessment, funding, safety or more than one of these?
- What does the individual plan or applicable procedure require?
- Whose authority is needed to decide or approve the action?
- What immediate step protects the apprentice and preserves accurate records?
- How will we explain the decision and check that it resolves the problem?



## CHAPTER 08

# Your practical employer toolkit

Contacts, useful records and a commitment you can act on

## Choose the right support route

Start with the person who can address the issue. Your named coach is normally the first contact for learning, evidence, progress and workplace application. The employer or line manager handles employment, work allocation and internal project responsibilities. KBC's compliance team advises on formal programme changes, eligibility, funding and gateway processes. Safeguarding concerns need the safeguarding route promptly, rather than a routine teaching query. Use the current induction information and KBC contact pages to confirm staff responsibilities if a contact changes. Names and roles can change during a programme; the support function should remain clear. Keep the named coach, manager, deputy and assessment organisation in your local apprenticeship record. Do not send sensitive personal or project information to a broad distribution list simply to obtain a faster response. For immediate danger or an emergency, contact emergency services and follow the relevant workplace emergency procedure. A routine email is not an emergency response. For a formal complaint or appeal, use the published procedure so that the matter is recorded, reviewed by the appropriate person and handled within the relevant process.

| Need                                           | Primary route                                                                   | What to provide                                                                                             |
|------------------------------------------------|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| Learning, evidence or progress                 | The named coach in the individual training plan.                                | The activity, question, relevant evidence and the decision or support needed.                               |
| Workplace alignment or employer engagement     | Tina Wright: Tina.Wright@kentbusinesscollege.com.                               | The role, opportunity or barrier and the practical change being considered.                                 |
| Formal programme, funding or employment change | Nada Ibrahim: Nada.Ibrahim@kentbusinesscollege.com.                             | Accurate dates, the nature of the change and relevant documents requested by the team.                      |
| Safeguarding or a welfare concern              | Safeguarding@kentbusinesscollege.com.                                           | Relevant facts, immediate safety concerns and a suitable contact method; follow the safeguarding procedure. |
| Formal complaint or unresolved service concern | kentbusinesscollege.com/policies/complaints/<br>office@kentbusinesscollege.org. | The concern, relevant dates, previous response and the remedy sought; follow the published stages.          |
| General routing or an unanswered query         | KBC office: +44 1622 958955.                                                    | The learner and programme reference where appropriate, the issue and previous contact attempts.             |
| Independent assessment arrangements or appeal  | The assessment organisation named in the apprentice's assessment arrangements.  | The applicable standard version, assessment reference and the specific query.                               |

### A useful support request

"I manage the apprentice on the Associate Project Manager Level 4 programme. Their role changes on 1 November and they will no longer have access to budget monitoring. We have identified a possible alternative workstream. Could the coach and compliance team advise what needs reviewing in the training plan?" This gives the team a concrete issue and a decision to support.

## Toolkit 1: the initial employer planning conversation

Use this structure before the commitment meeting and revisit it when the manager or role changes. It should produce a practical agreement rather than a lengthy narrative. The apprentice should contribute their ambitions, existing experience and support needs. The manager should bring a realistic view of work opportunities and capacity. KBC should connect the discussion to the initial assessment and programme requirements. Test the agreement against the next month's actual diary. If the proposed learning time conflicts with a major delivery milestone, resolve it before signing rather than assuming the apprentice will find a way. Confirm that the people named in the plan understand their role and have capacity to perform it. A good initial conversation prevents recurring misunderstandings later.

| Topic                  | Record the decision                                                                              |
|------------------------|--------------------------------------------------------------------------------------------------|
| Purpose                | The capability the apprentice needs to develop and the business reason it matters.               |
| Starting point         | Relevant experience, qualifications, existing strengths and areas of genuine new learning.       |
| Role and opportunities | The project or workstream, expected responsibilities and any known gaps in occupational breadth. |
| Authority              | Decisions the apprentice can take, approvals required and escalation limits.                     |
| Time and resources     | The paid learning pattern, equipment, access, workspace and cover for urgent work.               |
| People                 | Named manager, deputy, coach and specialist mentors.                                             |
| Evidence               | Where learning and work records will be kept, with confidentiality arrangements.                 |
| Support                | How the apprentice can request help, a private conversation or an adjustment.                    |
| Review                 | The first check-in, tripartite review and action owners.                                         |

## Toolkit 2: a workplace learning opportunity brief

A short brief helps turn a work task into purposeful development. It should describe the business outcome and the new capability to be developed, while keeping the apprentice's authority clear. The coach can help identify the relevant KSBs. Avoid assigning a code merely because its wording appears in the task title; the activity must actually provide an opportunity to learn and demonstrate it. The brief should also identify what happens if the activity is cancelled. A backup opportunity can preserve progress without forcing artificial work. Once the activity is complete, compare the intended learning with what actually occurred. The apprentice may have learned something different or discovered a gap that needs further development. Record that honestly and adjust the next activity.

| Field                   | Illustrative example                                                                                      |
|-------------------------|-----------------------------------------------------------------------------------------------------------|
| Business task           | Improve the weekly workstream report so that unresolved decisions are visible.                            |
| Learning purpose        | Develop analysis of project information and communication tailored to decision-makers.                    |
| Apprentice contribution | Review current reports, interview users, propose a revised format and coordinate a short pilot.           |
| Support                 | Project manager explains governance expectations; a data owner confirms sources.                          |
| Boundaries              | No change to live reporting or distribution without approval.                                             |
| Evidence                | Analysis, proposed format, feedback, approved pilot output and a record of the apprentice's contribution. |
| Success criteria        | Users can identify the decision, owner and required date; factual accuracy is maintained.                 |
| Review point            | Discuss the pilot after two reporting cycles and decide whether to adopt or revise it.                    |

## Toolkit 3: a direct-observation statement

### Illustrative statement

"On 12 November, I observed the apprentice lead the review of the testing schedule for the service portal project. They explained two dependencies, asked the technical lead to confirm resource availability and identified a conflict with the planned user-acceptance session. They presented two options and recommended moving preparation work earlier while retaining the agreed acceptance criteria. The project manager approved the revised sequence. The apprentice then updated the schedule and circulated the decision. I observed the meeting and reviewed the updated schedule; I did not observe all earlier analysis."

A workplace statement is strongest when it records what the observer actually saw or heard. It should identify the date, context, task, apprentice's action and observable effect. General praise does not establish a skill. The observer should stay within their knowledge and distinguish direct observation from information reported by someone else. The statement should be reviewed for accuracy and stored through the agreed evidence process. This example is useful because it describes behaviour and contribution without pretending to prove every aspect of competence. The apprentice can connect it with the schedule and decision record. A coach or assessor can then explore the reasoning. The observer should not invent detail, retrospectively claim attendance or state that all requirements have been met unless they have a proper basis for that conclusion.

- Name the observer and their relationship to the work.
- Record the activity and date accurately.
- Describe the apprentice's action in specific terms.
- Explain the result or decision observed.
- State the limits of the observation where relevant.
- Avoid unsupported grade predictions or broad personality judgements.

## **Toolkit 4: a review action and intervention record**

Use one concise record to connect a concern, the agreed response and the follow-up. This helps the employer and KBC distinguish a persistent barrier from a resolved issue. It also prevents a useful conversation from disappearing when staff change. The record should contain only the information needed for the learning action; sensitive welfare detail belongs in the appropriate restricted record. If an action fails, review the cause rather than automatically repeating it. The task may have been too broad, the support unavailable or the diagnosis incorrect. A revised plan should explain what will be different. Where a concern indicates a more serious risk, use the appropriate escalation route instead of keeping it indefinitely within a routine learning action list.

| Field                       | Illustrative entry                                                                                              |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------|
| Concern or development need | The apprentice can identify risks but responses lack owners and review points.                                  |
| Evidence                    | Two recent risk entries and discussion at the progress review.                                                  |
| Likely cause                | Limited experience coordinating responses with risk owners.                                                     |
| Apprentice action           | Prepare revised responses and discuss them with the relevant owners.                                            |
| Employer action             | Arrange access to the risk owners and observe one discussion.                                                   |
| KBC action                  | Provide feedback on response quality and test the apprentice's reasoning.                                       |
| Review date                 | An agreed date before the next routine tripartite review.                                                       |
| Success evidence            | Specific, feasible responses with confirmed owners and follow-up; apprentice explains why they are appropriate. |
| Outcome                     | What changed, what remains difficult and the next decision.                                                     |

## Toolkit 5: a credible business-impact record

Use this record for a bounded improvement where the apprentice has made a clear contribution. It works for time, quality, decision speed, rework or another relevant measure. The record should make the calculation transparent and identify uncertainty. It is acceptable to report a useful qualitative outcome where a reliable financial value cannot be established. For example, a shorter reporting cycle may release staff capacity without reducing expenditure. Describe it as capacity released unless there is evidence of cash savings. A reduction in defects may improve quality, but a small number of observations should not be presented as a guaranteed long-term rate. This disciplined approach makes positive results more persuasive because the reader can see how they were established.

| Field                | What to record                                                                              |
|----------------------|---------------------------------------------------------------------------------------------|
| Problem and baseline | The original performance, period measured and source of information.                        |
| Learning applied     | The method or capability the apprentice developed and used.                                 |
| Intervention         | What changed, when, who approved it and who else contributed.                               |
| Result               | The observed outcome using the same definition as the baseline.                             |
| Costs and effort     | Implementation time, resources and any continuing cost.                                     |
| Attribution          | What can reasonably be linked to the apprentice's contribution.                             |
| Limitations          | Other changes, small sample sizes, unverified assumptions or uncertain longer-term effects. |
| Sustainability       | Whether the improvement continues, who owns it and when it will be reviewed.                |
| Next step            | Adopt, extend, revise or stop the approach, with a reason.                                  |

### A useful impact sentence

"Across four comparable reporting cycles, preparation time fell from an average of six hours to four hours after the apprentice standardised the inputs. The manager checked the source records and found no increase in corrections. The result releases approximately two hours per cycle; the team will review whether it is sustained over the next quarter."

## Toolkit 6: gateway preparation without last-minute surprises

Use this as an employer preparation aid alongside the assessment organisation's current checklist. It does not replace the applicable assessment plan. Begin the conversation early enough to address a missing opportunity or weak evidence. The final readiness decision should be based on the apprentice's competence and the formal requirements, rather than on whether every box can be ticked quickly. A useful final question is: if the assessor asks the apprentice to justify a decision from this evidence, can they do so independently and honestly? If the answer is uncertain, identify the reason. They may need to revisit a concept, gain another opportunity or organise the evidence more clearly. None of these should be concealed by rewriting the account on their behalf.

- Confirm the apprentice's standard and assessment-plan version, and the assessment organisation selected.
- Review the coach's assessment of competence across the required knowledge, skills and behaviours.

- Check that the workplace project and its evidence are suitable, with the required scope approval process understood.
- For version 1.5, distinguish the completed pre-gateway project from the post-gateway assessed written report.
- Review the portfolio for relevance, attribution, confidentiality and method-specific mapping.
- Confirm the applicable English and mathematics requirements and any approved assessment adjustments.
- Agree the employer's readiness decision and obtain the apprentice's confirmation.
- Protect time and resources for report preparation, presentation and discussion, and confirm practical arrangements.
- Preserve access to project evidence after team changes or project closure.
- Confirm who will respond to assessment queries and how any further learning would be supported.

## Toolkit 7: a handover and progression conversation

When the manager changes or the apprentice moves to a different project, use a short handover to preserve the development plan. Explain the current stage, protected time, strengths, gaps and agreed actions. Introduce the incoming manager to the coach and ensure they can access the information needed for their role. Avoid including confidential support details that are not necessary for the handover. Progression is strongest when it is specific. "Continue developing" offers little direction. "Take responsibility for the next workstream's resource forecast, with monthly review by the project manager" creates an opportunity to build on the apprenticeship. Recognise that a newly competent practitioner still benefits from support as complexity increases. Completion is a foundation for further responsibility, not the end of learning.

| At a manager handover                                           | At programme completion                                                                    |
|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| Confirm the learner's current stage and next milestones.        | Review the capability gained and the evidence of workplace impact.                         |
| Explain the agreed paid learning pattern and work priorities.   | Agree the next responsibility and the support needed to succeed.                           |
| Identify current strengths, development needs and open actions. | Identify further experience, professional learning or certification eligibility to pursue. |
| Preserve access to relevant project records and mentors.        | Retain useful project practices and share learning appropriately with the team.            |
| Arrange the next review and clarify the deputy arrangement.     | Schedule a follow-up to assess how the new capability is being used.                       |

## The employer commitment in practice

Our partnership succeeds when the commitments in this guide become visible in the working week. The employer provides a suitable role, real opportunities and protected paid learning time. The apprentice engages, applies learning and presents honest evidence. KBC teaches, coaches, reviews progress and helps coordinate support. Each party raises concerns early and acts on agreed improvements. As the employer or line manager, commit to a small number of dependable habits: understand what the apprentice is learning; provide a meaningful opportunity to apply it; ask for evidence and reasoning; give specific feedback; attend reviews; remove barriers within your control; and use the appropriate support route when specialist help is needed. These habits create the conditions for competence more effectively than a declaration left unread after enrolment. This charter supports the individual apprenticeship agreement and training plan. It does not amend their terms or replace current funding, employment, safeguarding or assessment requirements. Use the current programme documents and the relevant specialist advice for decisions about a particular apprentice. Keep the focus on accurate information, fair support and the professional capability the programme is intended to develop.

### Your next three actions

These three actions turn the charter into an active development partnership.

- Confirm the apprentice's next useful workplace opportunity.
- Check that the paid learning time is protected in the actual diary.
- Arrange a short conversation in which the apprentice explains one recent decision and what they learned from it.

# Sources & edition notes

Programme and technical information should be read with the version and start-date conditions explained in this guide. The links below provide the primary reference points.

**01. Kent Business College: supplied Employer Line Manager Guide L4, 63-page source edition**

[https://kentbusinesscollege-my.sharepoint.com/:b:/p/maryam\\_mousa/IQBmYL6B5AVHToLqfKwB9Cj8AYC85BilcQNM6DZP9X61up4](https://kentbusinesscollege-my.sharepoint.com/:b:/p/maryam_mousa/IQBmYL6B5AVHToLqfKwB9Cj8AYC85BilcQNM6DZP9X61up4)

**02. KBC Associate Project Manager Level 4 programme**

<https://kentbusinesscollege.com/apprenticeships/associate-project-manager-level-4/>

**03. KBC apprentice charter and learning journey**

<https://kentbusinesscollege.com/learners/apprentice-charter/?programme=associate-project-manager-level-4>

**04. Skills England: Associate project manager ST0310 version 1.5, occupational standard and version log**

<https://skillsengland.education.gov.uk/apprenticeships/st0310-v1-5>

**05. Skills England: ST0310 version 1.5 complete EPA plan**

<https://skillsengland.education.gov.uk/apprenticeshipstandards/epatab?nodeId=208161>

**06. Skills England: ST0310 version 1.5 key information including minimum training hours**

<https://skillsengland.education.gov.uk/apprenticeshipstandards/keyinformation?nodeId=208161>

**07. GOV.UK: apprenticeship funding rules**

<https://www.gov.uk/guidance/apprenticeship-funding-rules>

**08. KBC complaints policy and escalation routes**

<https://kentbusinesscollege.com/policies/complaints/>

**09. PMI: Project Management Professional certification and eligibility**

<https://www.pmi.org/certifications/project-management-pmp>

# A stronger partnership. A purposeful programme.

A substantial employer reference for Associate Project Manager Level 4.  
Understand the programme, shape meaningful workplace opportunities and support your apprentice from the first conversation through learning, assessment and future development.

Inside: partnership responsibilities · curriculum and workplace application · evidence and assessment · protected learning time · progress reviews · employer voice and quality · safeguarding and inclusion · practical answers and support.



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